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The development of Business Improvement Areas as a mechanism for civic improvements has been enormously beneficial to the cities and towns of Ontario. The first BIA was established in Bloor West Village in Toronto in 1969; since then more than 200 similar organizations, representing about 40,000 businesses, have been established to improve, beautify and promote the business districts in Ontario municipalities.

The concept has been so successful that municipalities from Kenora to Windsor have adopted the idea for their own use. It has assisted in the revitalization of business areas from Ottawa to Owen Sound.

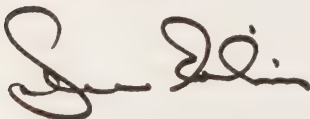
A Business Improvement Area is essentially a mechanism that encourages business people to join together in a co-operative effort to revitalize and rejuvenate their business district. But it also has the effect of improving and beautifying surrounding areas, and instilling a sense of civic pride, not only within its own boundaries, but within the entire community. The BIA is not only good for business; it is good for everyone.

This manual has been prepared to assist the business men and women who operate BIAs in Ontario. It was developed at the request of many individuals who are active in BIAs, and it is intended to help those business people improve their organizations, and make them more effective.

Because the idea of the Business Improvement Area continues to grow and develop the manual has been designed so that additions and deletions can be made as necessary. The Ministry of Municipal Affairs is committed to helping BIAs by providing continuing educational assistance and advice, and up-dated information for the manual will be sent to you as it becomes available.

I hope you will find the manual both informative and useful, and that it will encourage you in the important work BIAs perform all across Ontario.

Yours Sincerely,

A handwritten signature in black ink, appearing to read 'John Eakins', with a stylized flourish at the end.

John Eakins
Minister of Municipal Affairs.

How to use this Manual

Certain sections of this Manual - the sections dealing with the legislation and the restrictions on spending by BIAs - describe procedures that BIAs must follow. If you wish to form or operate a BIA you must adhere to the legislation and the regulations

This manual is meant as a working document, a handy reference for day to day use. It is not meant to be read cover to cover in a single reading, but rather section by section as the need arises. The sections are divided into major topics.

All of the sections should be read as suggestions and tips, rather than as requirements. Every BIA reflects local conditions, and each is different from the next. The strategies and approaches that work well in one location may fail utterly in another. You must develop for yourself the techniques and structures that are appropriate for your own business district.

That doesn't mean there are no guidelines available. This manual contains ideas and procedures that have been used successfully by business people who faced many of the situations and problems that face you. Their experience is valuable, even if it can not be duplicated exactly in your BIA.

Establishing a Business Improvement Area and operating it successfully demands a great deal of expertise and management skill; but they also demand imagination and a creative approach to solving problems. You will not find those qualities in this manual or any other; you have to develop them for yourself.

The manual is designed so that it can be expanded and updated. As new material becomes available we will forward it to you.

This manual was prepared by the Community Renewal Branch of the Ministry of Municipal Affairs. The Branch offers expert advice and support to communities like yours which are involved in the process of urban renewal and revitalization. The Branch provides extensive services to communities. A description of those services and contacts within the branch can be found in the chapter entitled: Community Renewal Branch Services for BIAs.

An Overview of BIAs

A Business Improvement Area is a form of legal organization designed to help local business and retail communities upgrade and promote their commercial and shopping district.

A BIA is essentially a self-help mechanism. It is organized by the local business community, and it exists to improve the physical appearance and economic well-being of that community.

A BIA can only be formed at the request of the local business community, which asks the municipal council to designate a specific geographic area as a Business Improvement Area.

After a period to hear objections and if and when that designation is approved, the BIA can develop and undertake programs to improve and beautify public property within the designated area, and to undertake advertising, promotion and publicity campaigns that benefit the area as a whole.

These programs are funded by a municipal levy which is assessed against all business tax payers within the designated area.

The BIA is managed by a Board of Management which develops these programs, usually with the assistance of a number of special committees. The Board of Management establishes a budget sufficient to fund the chosen programs, and presents that budget to the municipal council.

The council, which approves the budget, collects the money through the municipal tax system and allocates it to the Board of Management of the BIA.

Participation in the activities or management of the BIA is voluntary, but all business tax payers within the designated area must contribute to the municipal levy which finances the BIA's programs.

The concept of a Business Improvement Area was developed in the Bloor West Village in Toronto in 1969. Since then more than 200 BIAs have been established in Ontario, some with as few as 22 members, others with as many as 2,000.

Benefits

The cumulative effect of BIA activities should attract and maintain customers, clients and shoppers to the commercial area by improving the physical and economic business environment.

These benefits stem from two major provisions in the BIA legislation: the provision for a special charge to be collected from every business; and the formalized organizational structure provided for BIAs.

A successful BIA can:

- Attract and maintain customers for the area
- Effectively promote the area
- Increase participation by the municipal council and ensure greater co-operation between municipal officials and the business community in the revitalization of the area
- Generate community pride
- Encourage co-operation among merchants and professionals in the area
- Provide a mechanism for undertaking short and long-term projects in a planned and orderly manner

The special charge levied from each business within the designated area has a number of clear advantages.

1. The levy provides a solid foundation for planning and budgeting on an annual basis. This is the BIA's advantage over other business groups - funding. Everyone pays their fair share so that the organization can devote its time to activities other than fundraising.
2. It ensures that each business has a direct interest in the success of the BIA, since each business contributes toward the funding.
3. Cooperation between council and the BIA is encouraged since the council directs the collection of funds, yet the administration of the funds is left to the BIA Board.

The formalized structure of a BIA also has advantages.

1. The establishment of a BIA and a BIA Board of Management clearly shows the commitment of the businesses to the revitalization of their area. This show of commitment may be instrumental in gaining wide Council support for BIA initiatives
2. It allows business districts to benefit from the coordinated management techniques used by other shopping districts, particularly suburban shopping malls.

3. It is helpful in applying for government grants and programs as it shows a commitment from the area to self-help and an organizational structure capable of continuing initiatives.
4. It provides a clearing house for information and a forum for discussing the ideas of member businesses.

How BIAs are Established

The initiative for establishing a BIA should originate with the local business community. However, Community Planners of the Ministry of Municipal Affairs will provide assistance and guidance to business groups interested in forming a BIA. For information call the Community Renewal Branch (416) 585-6013 and ask for the planner for your area.

A number of specific steps should be followed in establishing a new BIA.

1. Hold meetings with affected business owners to determine if there is general support for a BIA. The concept should be explained and the ramifications for the affected business people discussed.

It should be emphasized that information from the Community Renewal Branch should be obtained before promoting the idea to all the local businesses or Council. A common problem at the outset is not knowing enough of the facts to sell others on the BIA concept.

2. If support is evident, the next step is for the businesses to assess the needs of the area and devise a plan to address these needs. A proposed budget and boundaries should be discussed and support secured from the affected businesses. The organizers should also secure the concurrence of Council with these proposals.
3. Write to the municipal council to formally apply for the BIA designation.

Role of Municipal Council

The actions the council must take when it receives a request to designate a specific area as a Business Improvement Area are described in Section 217 of the Municipal Act. Section A.1.3 of this manual contains a chart which describes the provisions of that section of the Act in detail.

The council is required to advise all business tax payers in the designated area that a BIA is being formed. This "notice of intent" should inform each business of the proposal and its implications in an easily-understood manner.

Each business has the right to object to the designation by notifying the clerk of the municipality within thirty days at which point the by-law has to go before the Ontario Municipal Board. If a petition is received by the clerk of the municipality within two months and is deemed "sufficient" by the clerk, then the by-law cannot be approved by Council. Two conditions determine sufficiency: the objectors must represent one-third of the business tax payers in the designated area, and represent one third of the total realty assessment in the designated area.

If both conditions are met, the council must not approve the formation of the BIA.

Role of the Ontario Municipal Board

If there are objections, but the objectors are less than one third of the total businesses and total business assessment, the council may pass the by-law designating the BIA, but that approval is subject to a hearing by the Ontario Municipal Board. The OMB may call witnesses, hear written or oral submissions by objectors or supporters, confirm or reject the designation of the BIA, or impose conditions on the operation of the BIA.

Final Approval

If no objections are received by the municipal clerk within 60 days after the mailing of the "Notice of Intent" to form a BIA, the council may approve the designation of the area by passing a by-law to that effect, and that approval is final.

BIA Supporters

Supporters of the BIA should have explained the idea to fellow members or businesses and generated support before the notice of intent is mailed.

Prior to the notice supporters of the BIA should be prepared to canvass businesses in the area to ensure that the idea is clearly explained, and that business people understand the implications.

Organizers should keep in contact with the municipal clerk and monitor the objections received. Objectors should be contacted to ensure they have correct information about the BIA.

The Board of Management

When the by-law establishing the BIA is passed, the council will appoint a Board of Management for the BIA. The Board of Management is a corporate body.

There is no limit on the number of members of the board. To be eligible for appointment to the board candidates must either be assessed for business taxes within the boundaries of the BIA, or be the nominee of a business or corporation assessed for business tax in the area. One member of the Board of Management must be a member of the municipal council.

Each member of the Board will hold office for the duration of the term of the council which appointed him or her.

BIA Funding

When the BIA has been established the Board of Management prepares a formal budget. This budget will reflect the projects which the BIA will undertake during the year; it should be established through consultation with the business and professional people in the BIA, and it should have their support. The budget should be formally presented to a general membership meeting. This is not a requirement of the legislation, but it does keep the membership involved and informed.

The budget is submitted to the municipal council, together with the minutes of the general membership meeting which approved it. The council may approve the budget or request some changes.

When the budget is approved the council adds a special charge to the business tax assessed against each business tax payer within the boundaries of the BIA. The proceeds of this special charge are then usually turned over to the Board of Management.

In general, each realty assessment payer within the BIA pays the same proportion of the total BIA budget as his realty assessment constitutes of the total assessment levied within the BIA boundaries.

Examples of BIA Levy

An Individual BIA member's share of the BIA budget is determined as follows:

$$\begin{array}{lcl} \text{(a)} & \text{The Establishment's} & \\ & \underline{\text{Realty Assessment}} & \times \text{ (c) BIA Budget} = \text{(d) BIA Levy} \\ \text{(b)} & \text{The Total Realty} & \\ & \text{Assessment of the BIA} & \\ & \text{(of those properties} & \\ & \text{which pay business tax)} & \end{array}$$

EXAMPLE 1 **Helen's Style Shop**

(a)	1978 Realty Assessment	=	\$4,564
(b)	Total Realty Assessment of all relevant BIA Properties	=	\$116,491
(c)	1978 BIA Budget	=	\$5,000
(d)	Helen's Style Shop BIA Levy for 1978	=	
	$\frac{\$ 4,564}{116,491} \times 5,000$	=	<u>\$195</u>

EXAMPLE II **Joe's Shoe Store**

$$\frac{\$ 5,000}{500,000} \times 25,000 = \underline{\$250}$$

Section 217 of the Municipal Act also permits the municipal council to assess a larger share of the budget against any businesses deemed to derive special benefits from the BIA. The legislation also permits a minimum and maximum charge to be levied against BIA members. For more information consult the BIA legislation.

Budget Restrictions

The Board of Management may not spend money not included in the annual budget submitted to the municipal council. It may not incur any indebtedness extending beyond the end of the current fiscal year, and it may not borrow money without the approval of council.

The Board of Management is required to submit an audited statement of accounts to the municipal council by March 1 of each year.

Budgeting for BIAs is described in more detail in section B.2.5 of this manual.

BIA Legislation Explained

Following is a chart that addresses each subsection of Section 217 by function. The explanation is a layman's interpretation of what the subsections mean and therefore should be used only as a guideline. We wish to emphasize that this is only a guideline and consultation with local legal staff should be pursued when necessary. The next two columns deal with an explanation of the legislation and the responsibilities of Boards of Management (BoM). This information is provided to ensure a smoother process and reduce problems during the formation of a BIA or any subsequent requirements or amendments.

If you have any helpful hints or additional information we would be pleased to hear from you so that we can pass the information along to other BIAs.

Section 217 of the Municipal Act, R.S.O. 1980. For accurate reference recourse should be made to the Statutes of Ontario.

SECTION 217 LEGISLATION

Subsection	Explanation	BoM Responsibility
Improvement area may be designated by by-law	<p>217.(1) The council of a local municipality may pass by-laws designating an area as an improvement area and may by by-law establish for any such area so designated a Board of Management to which may be entrusted, subject to such limitations as the by-law may provide, the improvement, beautification and maintenance of municipally owned lands, buildings and structures in the area, beyond such improvement, beautification and maintenance as is provided at the expense of the municipality at large, and the promotion of the area as a business or shopping area.</p>	<p>To ensure the future membership understands the BIA's role and responsibility, and also those of council</p> <p>To ensure that council knows what a BIA is and what the two areas of responsibility are (municipal & BIA)</p> <p>The Board of Management (BoM) should prepare short term & long term plans within its parameters of authority</p>
Notice of intention	<p>(2) Before passing a by-law designating an improvement area, notice of the intention of the council to pass the by-law shall be sent by prepaid mail to every person occupying or using land for the purpose of or in connection with any business in the area who is shown in the last revised assessment roll of the municipality as being assessed for business assessment within the meaning of the Assessment Act.</p>	<p>To reach an understanding with municipal staff as to who will write up the notice and to ensure it is written in such a manner that the business people will understand what is being proposed and the implications</p>
R.S.O. 1980 c. 31	<p>The last revised assessment rolls are used for this mailing</p>	<p>To educate the area business people about the establishment of the BIA through meetings, block captain systems, and written correspondence</p>

Subsection	Explanation	BoM Responsibility
Petition objecting to by-law	<p>(3) Unless a petition objecting to the passing of the by-law referred to in subsection (2), signed by at least one-third of the persons entitled to notice as set out in subsection (2), representing at least one-third of the assessed value of the lands in the area that is used as the basis for computing business assessment, is received by the clerk within two months next following the latest day of the mailing of any such notices, the council may pass the by-law, but, if such a petition is received by the clerk within such time, the council shall not pass the by-law.</p>	<p>Keep close tabs on "talk on the street." In other words make sure factual information is the only information being given out and any questions are answered by people who know</p> <p>Rumours and wrong information can get out of hand fairly quickly</p> <p>If someone is going to put in an objection, talk to them immediately as it may be based on wrong information</p>
Approval of O.M.B.	<p>(4) Subject to subsection (3), where a petition objecting to the passing of a by-law referred to in subsection (2) signed by one or more persons entitled to notice as set out in that subsection is received by the clerk of the municipality within thirty days next following the latest day of the mailing of any of such notices, the by-law shall not come into force without the approval of the Municipal Board.</p>	<p>Discuss immediately with the municipality what each of their respective roles are, if the municipal legal staff will represent them etc.</p> <p>Ensure that you have established the reasons for a BIA and the degree of support from other future members and arrange to give evidence</p>
Sufficiency of petition determined by clerk	<p>(5) The sufficiency of the petition described in this section shall be determined by the clerk and his determination shall be evidenced by his certificate and when so evidenced is final and conclusive.</p>	<p>Keep in regular contact with the clerk to see what objections are coming in - this will help determine how much individual contact is necessary</p>

Subsection	Explanation	BoM Responsibility
<p>Board of Management</p> <p>(6) A Board of Management established under subsection (1) is a body corporate and shall consist of such number of members appointed by council as the council considers advisable, at least one of whom shall be a member of the council and the remaining members shall be individuals assessed for business assessment in respect of land in the area or nominees of such individuals or of corporations so assessed.</p>	<p><u>Board of Management</u></p> <p>The Board of Management is a body corporate</p> <p>The number of members on the Board of Management is determined by council</p> <p>The members are appointed by council</p> <p>Minimum of one member must be a councillor and the remaining members must be individuals assessed for business in the area or nominees of such persons</p>	<p>This gives the BIA many additional responsibilities and authorities</p> <p>Suggest to council on appropriate size for the Board</p> <p>Many BIAs choose board members by way of a recorded vote at annual meetings and submit that list to council - should discuss with council first</p> <p>BIA should try to ensure the council representative is actively interested in the BIA</p>
<p>Term of Office</p> <p>(7) Each member shall hold office from the time of his appointment until the expiration of the term of the council that appointed him, provided he continues to be qualified, as provided in subsection (6).</p>	<p>The Board members hold office for the same term as council provided they continue to remain qualified</p>	<p>No legal procedures are available to stagger the terms although some BIAs do so unofficially - contact the Community Renewal Branch for more information</p>
<p>Vacancy</p> <p>(8) Where a vacancy occurs from any cause, the council shall appoint a person qualified as set out in subsection (6) to be a member, who shall hold office for the remainder of the term for which his predecessor was appointed.</p>	<p>If a vacancy should occur the replacement shall be appointed by council for the remainder of the council term</p>	<p>Same as subsection 6</p>

Subsection	Explanation	BoM Responsibility
Idem	(9) The members shall hold office until their successors are appointed and are eligible for reappointment on the expiration of their term of office.	Same as subsection 6
Estimates	(10) A Board of Management established under subsection (1) shall submit to the council its estimates for the current year at the time and in the form prescribed by council and may make requisitions upon the council for all sums of money required to carry out its powers and duties, but nothing herein divests the council of its authority with reference to rejecting such estimates in whole or in part or providing the money for the purposes of the Board of Management and when money is so provided by the council the treasurer shall, upon the certificate of the Board of Management, pay out such money to the Board of Management.	<p>Find out when these are needed, how detailed they need to be and how long the Board representative may speak to council on the matter</p> <p>Keeping council informed all year makes this process easier</p>
Expenditure of moneys	(11) The Board of Management shall not expend any moneys not included in the estimates approved by the council or in a reserve fund established under section 165.	<p>Determine the system to be used for payment of bills</p> <p>Common systems - bills are sent to the municipality to be paid or the BIA pays the bills and requisitions money as required</p> <p>Most BIAs send monthly or quarterly financial statements to council</p>

Subsection	Explanation	BoM Responsibility
Borrowing prohibited, restrictions on incurring indebtedness	(12) The Board of Management shall not borrow money and, without the prior approval of the council, it may not incur any indebtedness extending beyond the current year.	The Board must obtain approval to include debt beyond the current year
Application of R.S.O. 1980, c. 347	(13) Section 149 of this Act and section 64 and 65 of the Ontario Municipal Board Act apply to the giving of an approval of indebtedness by a council under subsection (12) as though the giving of the approval were the incurring of the indebtedness by the municipality.	Section 149 of the Municipal Act and section 64 and 65 of the OMB act apply to the giving of approval of indebtedness by a council The giving of approval by council to the Board to incur debt is as though the council were incurring the debt
Annual report	(14) On or before the 1st day of March in each year, a Board of Management shall submit its annual report for the preceding year to council, including a complete audited and certified financial statement of its affairs, with balance sheet and revenue and expenditure statement.	Make sure the annual report is submitted on time with the audited and certified statement Make sure it is in an acceptable format, and, if possible use this as an open opportunity to tell council more about what you do The B. of M. should present the annual report and certified statement personally to council

Subsection	Explanation	BoM Responsibility
Auditor	(15) The municipal auditor shall be the auditor of each such Board of Management and all books, documents, transactions, minutes and accounts of a Board of Management shall, at all times, be open to his inspection.	The municipal auditor shall be the auditor
Dissolution of Board	(16) Upon the repeal of a by-law establishing of Board of Management, the Board ceases to exist and its undertakings assets and liabilities shall be assumed by the municipality.	<p>The repeal of a by-law establishing the B. of M. can be passed by the council</p> <p>When the B. of M. ceases to exist any indebtedness, assets or liabilities of the Board are assumed by the municipality</p>

Subsection	Explanation	BoM Responsibility
Special charge	<p>(17) Subject to such maximum and minimum charges as the council may specify by by-law, the council shall in each year levy a special charge upon persons in the area assessed for business assessment sufficient to provide a sum equal to the sum of money provided for the purposes of the Board of Management for that area, together with interest thereon at such rate as is required to repay any interest payable by the municipality on the whole or any part of such sum, which shall be borne and paid by such persons in the proportion that the assessed value of the real property that is used as the basis for computing the business assessment of each of such persons bears to the assessed value of all the real property in the area used as the basis for computing business assessment.</p>	<p>Ensure that members have access to information, so that they can find out how much they will be paying each year (before the budget is approved by the membership)</p> <p>In actual fact the budget is determined, then the levy</p> <p>Subsection 10 is a safeguard as are your own procedural guidelines requiring notice of a budget meeting and a vote of members in attendance</p> <p>Ensure that members understand how this will affect them</p>
	<p><u>Methods of Levy</u></p> <p>Conventional (special levy)</p> <p>Each business pays the proportion of the budget that its commercial reality assessment bears to the total commercial reality assessment for a business is \$1,000 and the total area reality assessment of business's in the area is \$100,000 then the business will pay 1% of the budget established each year)</p> <p>Minimum/maximum</p> <ul style="list-style-type: none"> - Allows a by-law to balance substantial inequities in conventional levies by placing a floor and ceiling on possible levies - For example most businesses are paying \$50-\$150, however, a few are paying less than \$10 and a few are paying more than \$700 - A minimum of \$50 for anyone and a maximum of \$300 could be established - Those between would still be levied in the conventional manner 	

Subsection	Explanation	BoM Responsibility
Special charge where special benefit derived	<p>(18) Notwithstanding subsection (17), the council may by by-law provide that the sum required for the purposes mentioned therein shall be levied as a special charge upon and shall be borne and paid by persons in the area assessed for business assessment who in the opinion of the council derive special benefit from the establishment of the area, and the sum chargeable to such persons shall be equitably apportioned among them in accordance with the benefits that, in the opinion of the council, accrue to them from the establishment of the area.</p>	Ensure that the membership understands the process and how this will affect them
	A special benefit levy is totally separate means of levying from the conventional or min/max procedures	
	It is used in cases where unfair taxation would occur to certain businesses under subsec. 17	
	One can start with the businesses receiving the lowest benefit and apply a charge to them and then work upwards to charge other businesses according to the special benefits they receive	
	<u>Notice Procedures for Levy</u>	
	The conventional (special levy), minimum/maximum or special benefit levy can be established at the time the original by-law is passed	Whatever system is used the BIA must be able to give evidence to the OMB regarding the fairness and equity of the proposed system
	If min/max or special benefit levy (18) is passed after the original by-law has been approved then the following procedures apply	Should ensure the membership understands the process and implication

Subsection	Explanation	BoM Responsibility
Notice	<p>(19) Before the council passes a by-law specifying maximum and minimum charges under subsection (17) or a by-law under subsection (18), notice of the proposed by-law shall be:</p> <p>(a) published at least once a week for four consecutive weeks, and the by-law shall not be passed until after the expiry or fourteen days following the day on which the notice was last published; or</p> <p>(b) given in the same manner as a notice of a proposed by-law under subsection (2), and the by-law shall not be passed until the expiry of thirty days next following the latest day of the mailing of any such notices.</p>	<p>See subsection 2.3.4.5</p> <p>Keep close tabs on who is objecting and talk to them immediately as it may be based on incorrect information</p>
Objections	<p>(20) Any person who would be liable to a special charge levied in accordance with a by-law proposed to be passed by the council of a municipality under subsection (17) specifying maximum or minimum charges or under subsection (18) may object to the proposed by-law by filing written notice of the objection with the clerk of the municipality before the expiry of the period mentioned in clause 19 (a) or (b), as the case may be.</p>	<p>Same as above</p> <p>Board of Management must prepare its defence of the change in levy</p>
Approval of O.M.B.	<p>(21) Where an objection to a proposed by-law is made under subsection (20), the proposed by-law shall not come into force without the approval of the Municipal Board.</p>	<p>Should sort out roles and responsibility with the municipality before the hearing</p>

Subsection	Explanation	BoM Responsibility
Application	(22) Subsections (19), (20) and (21) do not apply to a by-law passed under subsection (17) or (18) to comply with an order of the Municipal Board under subsection (31).	Subsection 19,20,21 do not apply to by-laws under sub. sec. 17, or 18 which have been passed to comply with an order by the OMB under Sec. 31 (if the by-law is appealed and goes to the OMB and is altered, re-notification is unnecessary).
Separate notices not required	(23) Notice of proposed by-law required under subsection (19) may be given in the same notice as notice of a proposed by-law under subsection (2).	Notice procedure is the same as subsection 19
Proviso	(24) Notwithstanding anything in subsection (17) or (18), where moneys borrowed by the municipality are provided in any year by the council for the purposes of the Board of Management and where only a portion of such moneys are required to be repaid by the municipality to the lender in that year or in any subsequent year, only the portion of the moneys required to be repaid to the lender in any such year together with any interest repayable in that year in respect of the total of such moneys shall be included in the sum to be provided in that year by the levy under subsection (17) or (18).	If the Board gets approval for debts then the principal and interest must be included in estimates and the actual levy

Subsection	Explanation	BoM Responsibility
Manner of collection	(25) Any charge imposed under subsection (17) or (18) may be collected in the same manner and with the same remedies as provided by this Act for the collection of taxes upon business assessment.	<p><u>Non Payment of Levy</u></p> <p>Non-payment of the BIA levy by a business is dealt with in the same way as non-payment of business taxes</p> <p>Determine with clerk/council if payment is not made whether all the BIA budget will be advanced or if the BIA will have to take account of this in their budget through write-offs and supplementaries.</p>
Designation of enlarged improvement area	(26) The council of a local municipality may pass by-laws for designating as an improvement area an area that includes all of an existing improvement area designated under subsection (1).	<p><u>Enlarging a BIA</u></p> <p>Council can pass by-laws to expand (not to reduce) an existing area</p> <p>Determine whether or not the adjacent area wishes to join and how much support there will be from the existing and expanded area</p> <p>Educate proposed new members and establish means of communicating with them</p>
Application subss. (2-5)	(27) Subsections (2), (3), (4) and (5) apply with necessary modifications to the passing of a by-law under subsection (26).	<p>The notice procedure for enlarging an area is the same as for the original by-law (subsection 2.3.4.5) but should be sent to those businesses in the existing & expanded area.</p>

Subsection	Explanation	BoM Responsibility
When by-law comes into effect	(28) A by-law passed under subsection (26) shall not come into force until the 1st day of January next after its passing, or, where the approval of the Municipal Board is required before such by-law may come into force, until the day specified by the Municipal Board.	The by-law enlarging the area does not come into effect until January 1st of the following year, or in a case of an objection, date the OMB sets
Board of Management continued	(29) Where a by-law passed under subsection (26) comes into effect, the existing improvement area mentioned in that subsection is dissolved, but the Board of Management established for that improvement area is continued and shall be the Board of Management for the new improvement area designated under the by-law.	When a by-law under subsec. 26 (enlarging a BIA) comes into effect the existing BIA ceases to exist The Board of Management however continued and becomes the Board for the new area Should ensure representation from the new area either through a vacancy on the Board or involvement with a committee of the Board
Application	(30) The provisions of this section that apply to a Board of Management under subsection (1) or to a council or municipal auditor in respect of such a Board apply with necessary modifications to a Board of Management continued under subsection (29) and to the council of a local municipality in respect of such a Board over which it has jurisdiction and to the auditor of the municipality in respect of such Board.	New area must operate under all same legislative requirements as the old area Dissolving a BIA By-law creating a BIA can be repeated only by council should find out from the municipality what is required by them to dissolve the BIA
Approval of O.M.B.	(31) Where approval of the Municipal Board of a by-law passed under this section is required, the Municipal Board as a condition of giving its approval may by its order impose such restrictions, limitations and conditions with respect to such matter as may be necessary or expedient.	OMB as a condition of its approval may impose restrictions, limitations and conditions as it considers necessary or expedient Ensure the OMB has enough information so that unnecessary or inappropriate restrictions are not imposed

Subsection	Explanation	BoM Responsibility
<p>Repeal of by-law</p> <p>(32) A by-law designating an improvement area may be repealed to take effect upon the 31st day of December in the year in which it is passed.</p>	<p><u>Dissolving a BIA</u></p> <p>By-law creating a BIA can be repealed only by council</p> <p>Repeal of a by-law takes effect December 31st in the year the repeal is passed</p>	<p>Should find out from the municipality what is required by them to dissolve the BIA</p> <p>May wish to do this during the creation of a BIA</p>
<p>Non-application of subss. (2-4)</p> <p>(33) Notwithstanding anything in this section, subsections (2),(3) and (4) do not apply to,</p> <p>(a) a by-law passed under subsection (1) or (26) to comply with an order of the Municipal Board under subsection (31); or</p> <p>(b) a by-law passed under subsection (32).</p>	<p>Subsec. 2,3,4,5 do not apply to an OMB order under subsec. 31 or passed under subsec. 32 (notification and concurrence of the membership is not required for any condition ordered by the OMB on the BIA by-law</p>	
<p>Minister may enter into agreements</p> <p>(34) The Minister and a local municipality may enter into agreements for the provision of loans or grants to the municipality on such terms or conditions as are agreed upon for the purpose of the improvement, beautification and maintenance of municipally owned lands, buildings and structures in the municipality or in any defined area thereof and for the purposes mentioned in paragraph 55 of section 208, R.S.O. 1980, c. 302 s. 217.</p>	<p>The Minister of Municipal Affairs may enter into agreements for loans and grants to the municipality subject to such terms and conditions as agreed upon</p>	

Appendix I BIA Legislation

Section 217 of the Municipal Act governs the formation and operation of a BIA. The following chart summarizes the legislation.

SECTION 217 LEGISLATION

Improvement area may
be designated by by-law

217.-(1) The council of a local municipality may pass by-laws designating an area as an improvement area and may by by-law establish for any such area so designated a Board of Management to which may be entrusted, subject to such limitations as the by-law may provide, the improvement, beautification and maintenance of municipally owned lands, buildings and structures in the area, beyond such improvement, beautification and maintenance as is provided at the expense of the municipality at large, and the promotion of the area as a business or shopping area.

Notice of intention

(2) Before passing a by-law designating an improvement area, notice of the intention of the council to pass the by-law shall be sent by prepaid mail to every person occupying or using land for the purpose of or in connection with any business in the area who is shown in the last revised assessment roll of the municipality as being assessed for business assessment within the meaning of the **Assessment Act**.

R.S.O. 1980
c.31

Petition objecting to by-
law

(3) Unless a petition objecting to the passing of the by-law referred to in subsection (2), signed by at least one-third of the persons entitled to notice as set out in subsection (2), representing at least one-third of the assessed value of the lands in the area that is used as the basis for computing business assessment, is received by the clerk within two months next following the latest day of the mailing of any such notices, the council may pass the by-law, but, if such a petition is received by the clerk within such time, the council shall not pass the by-law.

Approval of O.M.B.

(4) Subject to subsection (3), where a petition objecting to the passing of a by-law referred to in subsection (2) signed by one or more persons entitled to notice as set out in that subsection is received by the clerk of the municipality within thirty days next following the latest day of the mailing of any of such notices, the by-law shall not come into force without the approval of the Municipal Board.

**Sufficiency of petition
determined by clerk**

(5) The sufficiency of the petition described in this section shall be determined by the clerk and his determination shall be evidenced by his certificate and when so evidenced is final and conclusive.

Board of Management

(6) A Board of Management established under subsection (1) is a body corporate and shall consist of such number of members appointed by council as the council considers advisable, at least one of whom shall be a member of the council and the remaining members shall be individuals assessed for business assessment in respect of land in the area or nominees of such individuals or of corporations so assessed.

Term of Office

(7) Each member shall hold office from the time of his appointment until the expiration of the term of the council that appointed him, provided he continues to be qualified, as provided in subsection (6).

Vacancy

(8) Where a vacancy occurs from any cause, the council shall appoint a person qualified as set out in subsection (6) to be a member, who shall hold office for the remainder of the term for which his predecessor was appointed.

Idem

(9) The members shall hold office until their successors are appointed and are eligible for reappointment on the expiration of their term of office.

Estimates	(10) A Board of Management established under subsection (1) shall submit to the council its estimates for the current year at the time and in the form prescribed by council and may make requisitions upon the council for all sums of money required to carry out its powers and duties, but nothing herein divests the council of its authority with reference to rejecting such estimates in whole or in part or providing the money for the purposes of the Board of Management and when money is so provided by the council the treasurer shall, upon the certificate of the Board of Management, pay out such money to the Board of Management.
Expenditure of moneys	(11) The Board of Management shall not expend any moneys not included in the estimates approved by the council or in a reserve fund established under section 165.
Borrowing prohibited, restrictions on incurring indebtedness	(12) The Board of Management shall not borrow money and, without the prior approval of the council, it may not incur any indebtedness extending beyond the current year.
Application of R.S.O. 1980, c. 347	(13) Section 149 of this Act and section 64 and 65 of the Ontario Municipal Board Act apply to the giving of an approval of indebtedness by a council under subsection (12) as though the giving of the approval were the incurring of the indebtedness by the municipality.
Annual report	(14) On or before the 1st day of March in each year, a Board of Management shall submit its annual report for the preceding year to council, including a complete audited and certified financial statement of its affairs, with balance sheet and revenue and expenditure statement.
Auditor	(15) The municipal auditor shall be the auditor of each such Board of Management and all books, documents, transactions, minutes and accounts of a Board of Management shall, at all times, be open to his inspection.
Dissolution of Board	(16) Upon the repeal of a by-law establishing of Board of Management, the Board ceases to exist and its undertakings assets and liabilities shall be assumed by the municipality.

Special charge

(17) Subject to such maximum and minimum charges as the council may specify by by-law, the council shall in each year levy a special charge upon persons in the area assessed for business assessment sufficient to provide a sum equal to the sum of money provided for the purposes of the Board of Management for that area, together with interest thereon at such rate as is required to repay any interest payable by the municipality on the whole or any part of such sum, which shall be borne and paid by such persons in the proportion that the assessed value of the real property that is used as the basis for computing the business assessment of each of such persons bears to the assessed value of all the real property in the area used as the basis for computing business assessment.

Special charge where special benefit derived

(18) Notwithstanding subsection (17), the council may by by-law provide that the sum required for the purposes mentioned therein shall be levied as a special charge upon and shall be borne and paid by persons in the area assessed for business assessment who in the opinion of the council derive special benefit from the establishment of the area, and the sum chargeable to such persons shall be equitably apportioned among them in accordance with the benefits that, in the opinion of the council, accrue to them from the establishment of the area.

Notice

(19) Before the council passes a by-law specifying maximum and minimum charges under subsection (17) or a by-law under subsection (18), notice of the proposed by-law shall be:

- (a) published at least once a week for four consecutive weeks, and the by-law shall not be passed until after the expiry of fourteen days following the day on which the notice was last published; or
- (b) given in the same manner as a notice of a proposed by-law under subsection (2), and the by-law shall not be passed until the expiry of thirty days next following the latest day of the mailing of any such notices.

Objections	(20) Any person who would be liable to a special charge levied in accordance with a by-law proposed to be passed by the council of a municipality under subsection (17) specifying maximum or minimum charges or under subsection (18) may object to the proposed by-law by filing written notice of the objection with the clerk of the municipality before the expiry of the period mentioned in clause 19 (a) or (b), as the case may be.
Approval of O.M.B.	(21) Where an objection to a proposed by-law is made under subsection (20), the proposed by-law shall not come into force without the approval of the Municipal Board.
Application	(22) Subsections (19), (20) and (21) do not apply to a by-law passed under subsection (17) or (18) to comply with an order of the Municipal Board under subsection (31).
Separate notices not required	(23) Notice of proposed by-law required under subsection (19) may be given in the same notice as notice of a proposed by-law under subsection (2).
Proviso	(24) Notwithstanding anything in subsection (17) or (18), where moneys borrowed by the municipality are provided in any year by the council for the purposes of the Board of Management and where only a portion of such moneys are required to be repaid by the municipality to the lender in that year or in any subsequent year, only the portion of the moneys required to be repaid to the lender in any such year together with any interest repayable in that year in respect of the total of such moneys shall be included in the sum to be provided in that year by the levy under subsection (17) or (18).
Manner of collection	(25) Any charge imposed under subsection (17) or (18) may be collected in the same manner and with the same remedies as provided by this Act for the collection of taxes upon business assessment.
Designation of enlarged improvement area	(26) The council of a local municipality may pass by-laws for designating as an improvement area an area that includes all of an existing improvement area designated under subsection (1).

Application subss. (2-5)	(27) Subsections (2), (3), (4) and (5) apply with necessary modifications to the passing of a by-law under subsection (26).
When by-law comes into effect	(28) A by-law passed under subsection (26) shall not come into force until the 1st day of January next after its passing, or, where the approval of the Municipal Board is required before such by-law may come into force, until the day specified by the Municipal Board.
Board of Management continued	(29) Where a by-law passed under subsection (26) comes into effect, the existing improvement area mentioned in that subsection is dissolved, but the Board of Management established for that improvement area is continued and shall be the Board of Management for the new improvement area designated under the by-law.
Application	(30) The provisions of this section that apply to a Board of Management under subsection (1) or to a council or municipal auditor in respect of such a Board apply with necessary modifications to a Board of Management continued under subsection (29) and to the council of a local municipality in respect of such a Board over which it has jurisdiction and to the auditor of the municipality in respect of such Board.
Approval of O.M.B.	(31) Where approval of the Municipal Board of a by-law passed under this section is required, the Municipal Board as a condition of giving its approval may by its order impose such restrictions, limitations and conditions with respect to such matter as may be necessary or expedient.
Repeal of by-law	(32) A by-law designating an improvement area may be repealed to take effect upon the 31st day of December in the year in which it is passed.
Non-application of subss. (2-4)	(33) Notwithstanding anything in this section, subsections (2),(3) and (4) do not apply to, (a) a by-law passed under subsection (1) or (26) to comply with an order of the Municipal Board under subsection (31); or (b) a by-law passed under subsection (32).

Minister may enter into agreements

(34) The Minister and a local municipality may enter into agreements for the provision of loans or grants to the municipality on such terms or conditions as are agreed upon for the purpose of the improvement, beautification and maintenance of municipally owned lands, buildings and structures in the municipality or in any defined area thereof and for the purposes mentioned in paragraph 55 of section 208, R.S.O. 1980, c. 302 s. 217.

B. ADMINISTRATION

1. ORGANIZATION

2. PLANNING

3. MEETINGS

B. ADMINISTRATION

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1. Organization

Introduction

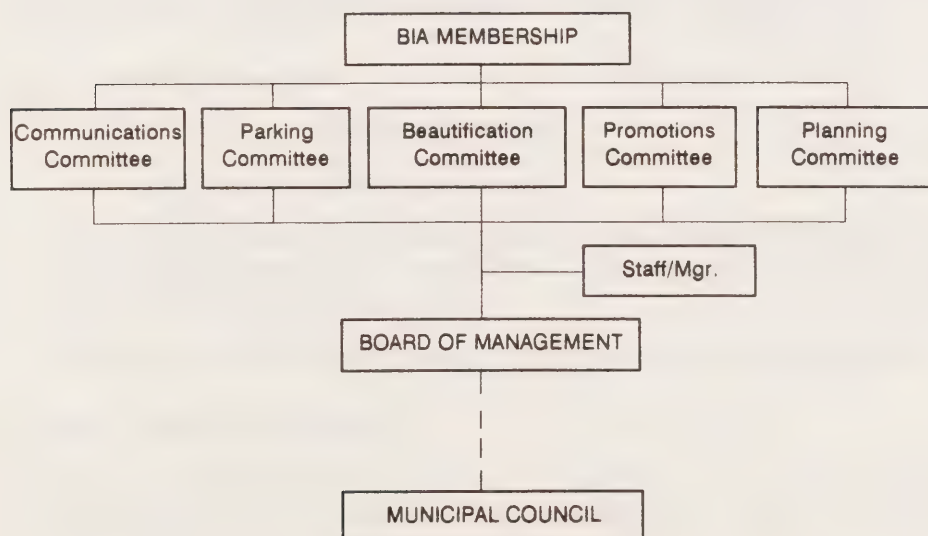
This section of the manual deals with the organization of a Business Improvements Area, the structures most BIAs have found it necessary to develop, and the usual forms of organization.

A Business Improvement Area is normally formed at the request of business people within a specific geographic area, and is operated by its members. The method of organizing a BIA and the legal requirements that must be met are discussed in section A.1. This section deals with the organization and operation of a BIA after it has been established.

Each BIA is free to find the form of organization and structure that best serves local needs, but experience has shown that some common elements are adopted by virtually all BIAs.

Typically a BIA should have a written **constitution**, or a set of rules that determine how it will conduct its business. Normally there is a **Board of Management** which is directly responsible for the operation of the BIA. The Board of Management is usually assisted by a number of **committees** which deal with specific areas of responsibility. Each of these elements is discussed in the following sections.

For many BIAs, the organizational structure of the BIA will look like the following organization chart:



Structure, Constitutions and Board Policies

The structures and rules which determine how the BIA will be run should be written down, either as a constitution or as a specific set of policies. These structures and rules should be made available to BIA members so they understand how the organization is operated and how they fit into it. Additions can be made to either document as time goes by and as changing needs dictate. A sample constitution is included in Appendix B II at the end of this chapter.

The Board of Management may also prepare and present an Annual Report each year, with copies available to the membership, the local municipality and the Ministry of Municipal Affairs. A sample Year-End Report is included in Appendix B I at the end of this chapter.

Important Issues

A number of questions recur in the process of developing the structure and organization of a BIA. A BIA is typically a complex organization, in which a number of different groups must be accommodated. There will be a Board of Management which is responsible for the over-all management of the organization. There will be committees which undertake specific tasks - for example, promotion. And it will be necessary to open permanent channels of communication and maintain regular liaison with a number of community groups: the municipal council, the general public, other business organizations, and the members of the BIA itself.

Guidelines

Because similar demands are placed on most BIAs, a number of issues have been identified which should be resolved early in the organizational process. They are described briefly below in guidelines provided by the St. Catharines BIA.

The Board of Management

- How members of the board will be chosen.
- The role and responsibilities of the board.
- Membership involvement at Board meetings (i.e. whether BIA members can speak at Board meetings - do they have to make a request at least a week prior to be included on the agenda, etc.).
- How the membership at large will be kept informed of the Board's activities.

General Membership Meetings

- How, when and to whom will notices and agendas be sent; will the proposed budget go with the agenda; should objectives for the year be published beforehand for membership input, etc.?

- What types of issues will be voted on at the meeting, i.e. budgets, board members, objectives, etc.?
- How will the vote be conducted? (recorded?)
- Who is eligible to vote?
- Minimum attendance requirements.

Committees

- How will the Board establish committees?
- Who is responsible for obtaining committee members?
- What the function and level of responsibility of each committee will be.
- How notices of meetings and agendas will be distributed and how far in advance of meetings.
- How the committees will report to the Board.

Liaison with the Municipality

- How will Council and municipal contacts be kept informed of the BIA's activities and how often?
- Will the Board attend Council meetings to:
 - Present the new budget?
 - Present the yearly objectives?
 - Update Council bi-annually on progress towards objectives?

When these questions are answered you will have made most of the decisions required to establish the formal structure of your BIA.

The Board of Management

A BIA is normally operated by a Board of Management which is appointed by the municipal council. In the case of a newly-formed BIA, council usually appoints the Board of Management on the recommendation of the BIA "Steering" Committee. Many BIAs present a slate of elected candidates to Council. The Board of Management will typically have a number of officers, including a chairman, vice-chairman, secretary and treasurer.

The Board of Management in turn appoints a number of committees to perform specific functions. The chairmen of the committees appointed by the Board are also usually Board members. The function of committees is discussed in the section entitled "Committees".

The Board of Management is required to establish a program of activities and a budget to fund those activities. The process of setting a budget is discussed in the section entitled "Budgeting".

The Responsibilities of the Board of Management

The Board of Management is ultimately responsible for the overall operation of every aspect of the BIA. This involves overseeing the work of the various committees and reporting to the municipal council on the operation of the BIA. The following summarizes the role and responsibilities of the Board of Management.

The Role of the Board of Management

1. Determines the Needs of the Association
 - the Board evaluates the BIA's strengths and weaknesses, and surveys customers, consumers and BIA members to determine which needs are the most important and should be addressed by the BIA.
2. Formalizes an Organizational Structure
 - it establishes procedural guidelines or a constitution to ensure that members understand how the organization works and how they fit into the decision-making process.
3. Determines the Function, Identity, and Direction of the BIA
 - the Board is the executor of the collective will of BIA members
 - they are accountable to BIA members
 - they are available to members
 - they establish a public profile, and develop channels to:

- Community
- Council
- BIA Membership
- Internal Committees
- External Agencies/Groups

4. Formalizes a Written Plan of Action

- it establishes short and long term goals

5. Sets a Budget

- based on the needs of the BIA; the budget should reflect the BIA's program of activities
- the budget should be conveyed to membership, and ratified by the general membership meeting
- the Board is responsible for implementation and monitoring

6. Establishes Committees to:

- perform specific functions, eg. beautification, promotion, communication.
- share the workload of the BIA

7. Reviews Committees by:

- establishing reporting relationships (Minutes)
- motivating members
- delegating tasks
- supervising results

In most BIAs, the principal task of the Board of Management - and the *raison d'être* of the BIA itself - is the development and implementation of a comprehensive strategy for the economic and physical revitalization of the business area.

An effective revitalization strategy involves a two-pronged process: immediate, short-term actions, and a comprehensive long-term plan.

A comprehensive strategy for revitalization involves seven important aspects:

- organization
- marketing
- promotion
- recruitment
- budgeting
- communications
- physical improvements

Each of these aspects of revitalization is discussed in detail in subsequent chapters of this manual. You should be aware of them, and all figure in both your short and long term action plans.

Committees

While the Board of Management has the overall responsibility for the operation of the BIA, it is the committees which actually develop and implement the programs which will make the BIA successful.

Committees are established to relieve the Board of Management of some of the burden of organizing projects -- in effect to share the workload -- and to involve a greater number of people in the activities of the BIA.

A BIA may appoint as many committees as it wishes. The number of committees established depends upon the short and long term goals of the organization. Some committees are established on a year-round basis (standing committees) and others are created to perform certain specific tasks (ad hoc committees).

Formal guidelines for committees should be drawn up, based on the policies and function of the committees, and given to each new committee member.

Who should be represented on BIA Committees?

You may appoint anyone you wish to your committees, including individuals who have some particular expertise that may be valuable, but who are not members of the BIA. The chairman of each committee should be a member of the Board of Management in order to ensure first-hand reporting.

In addition, there are four groups which play key roles in every Ontario business community, and it is important that each of the four be represented on your committees. The four groups are:

1. Businesspeople and merchants.
2. Municipal council.
3. Municipal administrative staff.
4. The general public.

Because the roles of the businesspeople and council are the most vital, these two groups should receive the greatest representation.

1. Businesspeople and Merchants

Businesspeople and merchants must be represented on your BIA committees. They have the greatest vested interest in its success and are directly affected by any BIA program. They will also be the principal source of funding for the BIA's projects, and they should have a prominent part in determining how the BIA funds will be spent.

In order to gain the support of the entire business community, you may wish to include Chamber of Commerce members on your committees in order to establish a formal liaison between the two organizations. The Chamber members selected should also be businesspeople within the boundaries of the BIA.

You should also involve your non-retail BIA businesses as much as you can. Bankers, lawyers, accountants and other service businesses all have a vested interest in ensuring that the business improvement area is a pleasant environment for their clients.

Develop a regular forum, such as breakfast or coffee meetings, for your members to establish personal contacts, to advise them of upcoming committee meetings and BIA programs and to reinforce the BIA philosophy as a self-help mechanism.

Interesting speakers on pertinent topics may promote better attendance as they attract more people to participate.

2. Municipal Council

Representation on your committees from the municipal council is critical, for a number of reasons:

- Any physical work will take place on municipal property, e.g. sidewalks.
- Council has the ability to review and streamline the development process, which is crucial for a physical revitalization program.
- Council may serve as an important source of funding for BIA programs. The more directly involved and committed council is to BIA programs, the more likely it is to contribute financially.
- Council can direct the municipal administrative staff; the staff can serve as an important source of expertise, information and manpower.
- In most towns the municipality owns land within the boundaries of the BIA. The town hall, the public library, the firehall, are all owned by the municipality.
- Council can influence the decisions of other government landowners, such as the fate of the old courthouse or the location of a new liquor store.

Which Councillor?

The enabling legislation dictates that a municipal councillor be represented on the Board of Management. The BIA may make suggestions to the Council for a specific municipal council representative, based on who they feel will do the best job for the BIA.

Certain councillors may be better qualified for representation on your Board of Management and committees than others. If council has formed an economic development committee, for example, the members of that committee may be ideal candidates. BIA businesspeople who have been elected to council are also good candidates for your committee.

Your BIA councillor is responsible for ensuring your interests are represented at Council. He or she is also responsible to ensure that municipal interests are reflected in BIA actions. He or she will also advise you of municipal actions which affect the core area, such as street closures for maintenance work, special garbage pick-up during holidays, new parking policies, etc.

3. Municipal Administrative Staff

Municipal employees are an important source of information. They also have the expertise to undertake essential tasks. Often, things that must be done in preparing and implementing a BIA program can form a part of their usual responsibilities, if sanctioned by council.

By including municipal staff on some of your committees, you can encourage their interest and commitment to your BIA program. The staff often advises the Council and can influence policy and decisions in support of the BIA.

Because senior municipal employees work closely with the community, they are usually knowledgeable about what can be done, and how to do it. Representation on BIA committees by a development officer, municipal clerk or municipal engineer, may be of considerable assistance in the task of planning and implementing your BIA plan of action.

4. General Public

The final group which should be considered when structuring a committee is the consuming public. The perspective of the user is important both for determining what is wrong with the BIA and what should be done. Any viable long-term solution to the area's problems will invariably affect the entire community. Representatives from the community should be included on at least one of your committees.

Size of Committees

The committee must be of a workable size. Membership must be sufficiently large to obtain adequate community representation and to ensure the formation of a strong group that can get things done, but large groups can be difficult to manage. Experience has shown it is best to remain small -- between 6 and 10 people. Any more than 10 people and the committee becomes unwieldy.

When considering prospective members for your committees, you are not limited to BIA members. You can draw on expertise from outside the BIA, involving anyone who will help your committee attain its goals. For example, on your Promotions Committee you may wish to involve a marketing expert from a local college or high school. Get the expertise you need.

One method of maintaining a workable size while maximizing participation is to include non-voting "ex officio" members. These are members who, by virtue of their position or expertise, are invited to participate as resource persons to the committee. But they have no vote, and are not involved in all discussions or procedural functions. The planner, a Chamber of Commerce representative, engineer or economic development officer, for example, could be a non-voting member.

A second method of maintaining a workable committee size is to invite selected participants or interested individuals only to those specific meetings where a special problem is discussed or a particular viewpoint is desirable. Consultants, for example, can be invited to attend only those meetings where their specialized input is required.

Summary

Regardless of how you ultimately structure your committees, three rules of thumb should be followed:

1. Ensure that the committee represents the interests of all parties affected by the BIA program.
2. Ensure that the individuals comprising the committee are strongly committed to the BIA program and are leaders in your community. However, sometimes people who disagree with the concept can become excellent participants by inviting them to become involved - through your committees.
3. Remember that the ideal structure may not be feasible in your community. Work as best you can with what you have.

The following table summarizes the role and responsibilities of committees.

Role of the Committee

1. To Share the Workload

- make sure leaders are committed
- make sure members are prepared to perform the work

2. Structure

- chairman of the committee should be on the board to ensure liaison
- representation on committees can come from anywhere the needed expertise is available
- ensure representation from:
 - business community
 - council
 - municipal administrative staff
 - general public
- establish formal guidelines to ensure continuity and understanding of committee's purpose

Responsibilities of the Committee

- upon the direction of the board, develop, document, and execute a program and budget for its term in office
- share workload, information with other BIA members
- establish sub-committees as required e.g. a sub-committee of the promotions committee might be a special "sidewalk sale" committee.

Staffing

Depending upon the size of a BIA, its funding potential, and its priorities, some full or part-time staff may be required in addition to consultants, who can provide technical expertise, and chartered accountants, who prepare an audited financial statement for council each year. The experience of BIA's has shown that secretaries and BIA managers are the most common types of staff required, along with promotional and maintenance personnel.

Administrative Support Staff

Support staff are the most popular classification of employee in Ontario BIA's. This factor is likely the result of both affordability and the administrative capabilities of secretaries. A secretary may prove the most cost efficient way to properly run BIA office and, if bookkeeping is included in the job description, may help defray the cost of the required annual financial statement. Other responsibilities may include duties such as typing, filing, recording of minutes, telephone service and general organization. A full-time, or even part-time secretary, can: provide continuity between the Board and its members; maintain a readily accessible contact; and ensure a "presence" in a BIA office.

In Ontario, a recent (1987) survey of BIA's indicated that 33 percent of those BIA's which responded to the survey employ support staff. Of these, 15 percent are full-time and 85 percent are part-time employees. Part-time secretaries generally earn less than \$10,000 per year. All sizes of BIA's employ a secretary and, in most instances, where only one staff member is employed, that staff person is a secretary. Full-time secretaries are usually employed where a BIA also employs a full-time manager. The ability to maintain two full-time employees is usually limited to larger BIA's.

Managerial Staff

Forty-three percent of the responding Ontario BIA's employ a BIA manager. Fifty-seven percent of the managers employed are full-time and the remaining forty-three percent are part-time. Part-time managers earn less than \$10,000 per year whereas most full-time managers earn between \$10,000 and \$40,000 per year. Again size of the BIA is the determining factor in a BIA's ability to hire a manager.

The primary responsibility of a BIA manager is to assist the Board in implementing a revitalization strategy. The most effective method of fulfilling this responsibility is through extensive coordination. The manager can assist in the actual development of a strategy as well as in the administration and operation of a BIA. A good manager can keep momentum and enthusiasm alive and can act as a resource person to the Board.

A manager may also serve as a vital link between the Board and BIA members as well as coordinate all the activities of committees, community groups, volunteers and council. Much of the onus of "following through" on short and long term actions rests with the manager. Total responsibility for implementation and coordination, however, should not be assigned to the manager. It is the Board which must assume ultimate responsibility for any BIA programs and provide direction to the manager.

The following excerpt from "Street Beat", Winter, 1985, an Ontario Ministry of Municipal Affairs publication for Ontario BIA's, both summarizes the manager's role and provides some insight on what to consider when hiring a manager or coordinator.

"Experience has demonstrated that one of the major keys to the proper and orderly development of Business Improvement Areas in Ontario is the role of the efficient and effective professional executive personnel operating under the auspices of a Board of Management.

Such individuals must function under a wide range of influences, being excellent communicators with their diverse and involved audience. They must be competent and authoritative, and at the same time, must always be aware that it is the volunteer executive of the Board of Management who carry the ultimate policy and program responsibilities. The Board of Management executive must accept this responsibility but must also ensure that the professionals working on their behalf have sufficient power and authority to make decisions when required.

Experience has also shown that when major mistakes are made in the decision to employ professionals, in the selection of individuals to fill the posts, in evaluation of the incumbent's activities in office, or in the procedures to monitor their progress, very difficult situations arise which can ultimately retard the development of the BIA and cause a communications impasse between the Board of Management and their council."

Other Support Staff

Other staff persons which may assist the BIA Board in effectively operating a BIA program include promotional and maintenance personnel. Promotional personnel can either be hired on a part-time basis to organize, coordinate and implement a specific event, or as a full-time employee to develop and implement a comprehensive promotional package. All should be public relations orientated.

Employment programs are available to assist in hiring student help during the summer or an unemployed person in your community that may be particularly suited to the interpersonal or communications role of a promotions coordinator.

Similarly, maintenance personnel can be hired at certain times of the year to ensure that special attention is directed to the appearance of the BIA area. Spring and summer, in particular, are suitable times to plant flowers, clean up garbage, paint street furniture and clean public areas.

A maintenance person can be hired on a part-time basis and provide maintenance over and above that provided by the municipality to make the BIA appear especially "spruced-up" and attractive.

To help Boards of Management, a set of guidelines exist called The Employment of Professionals in BIAs.

This book outlines a job description, draft for a contract between the Board and staff person, and even provides questions for the Board to consider for interviews.

Prepare a job description before you hire someone. The staff person will need a guideline to work from.

Without a job description, the staff person will be operating with some responsibility, but without any authority or direction.

The Manager

Definition of Position. In general terms the (Executive Director/Promotion & Business Manager) is the chief administrative officer of the Board of Management reporting directly to the Executive Committee through the President/Chairman and responsible to the Board of Directors.

The Manager is the one who sees to it that the organizational machinery really works. He/she not only takes care of general administration, but contributes leadership, skill, and their knowledge of budgeting, organizational structures, planning, advertising and promotion. With his/her professional knowledge, personal qualities, and full-time attention, he/she helps to provide perspective, continuity and direction in the organization's program.

Each Board of Management has a variety of general goals as well as certain unique goals. Accordingly, a Manager's function must be defined and performance measured in relation to a specific, standard job definition. Further, job definition and performance measurement should not fail to recognize specific assets and liabilities which the Manager brings to the job and which are present or lacking in the people with whom he/she will be working.

The professional staff member should give leadership to the Board of Management in formulation of objectives and decisions of general policy though ultimate control should remain with the Board of Management.

The professional staff member provides continuity between successive boards which result from the democratic process of appointments in accordance with the municipal by-laws.

He/she is a communications link between the Board of Management and the business community and between the Board of Management and City Council and the outside world. As such the Professional staff member must be authorized to speak for the body within the context of all those policies established by its Board of Directors.

The professional staff member is a catalyst to whom the volunteers can look for planned programs and advice for progressive and successful undertakings. He/she should serve as consultant, guide, analyst, planner, negotiator, interpreter, and should promote and develop participation and leadership within the Board of Management and the Business Improvement Area volunteers.

The preceeding were excerpts taken from The Employment of Professionals* detailing the role and responsibilities of the Executive Director (Manager).

*Source: Ministry of Housing The Employment of Professionals, Peter T. Mercer, 1980. Copies available from the Ontario Government Bookstore, 880 Bay St., Toronto, Ontario M7A 1N8.

Budgeting

Budgeting, which is inextricably linked to programming and staffing, is the most important operating consideration of a successful BIA. The following information is taken from an article by Clinton Collier published in "Streetbeat, Fall 1984" by the Ministry of Municipal Affairs, entitled Better Budgeting for BIA's

"A good budget provides controls and without control, effective management can be difficult. An effective BIA 'correctly assesses and reflects, in its activities, the needs of its members', namely the improvement of the business improvement area for commerce and business activity. A good budget should do the same."

Before you determine your budget, define your priorities. List your objectives from the most important and urgent to the least important and urgent. Involve your membership so that your planning will properly reflect majority consent. Hold a series of discussions among the board members, key staff and the general membership to reach a consensus on the types of projects to pursue.

To obtain general support for major expenditures, you must be able to explain what you propose to do, how you are going to do it and how much it is going to cost.

Make sure your budget is realistic and make sure your budget will provide "substantial benefits" to your members. These benefits will grow out of a good program of activities. The bottom-line is that to get support from your members, you must first convince them that they will earn benefits. Your action plan and budget must convince them of those benefits.

If you determine, based on your budget needs, that you are underfunded, then you must attempt to either:

- streamline projects to suit your availability of funds; or
- increase your budget.

Difficulty will be experienced if boards are underfunded. Be realistic about your projects and available funds.

When you are preparing your budget, show both income and expenses, giving a full picture of the inflow and outflow of funds.

Make sure you use your budget. Do not let it sit in a file. Regularly dig it out and compare your planned revenue and expenses with actual revenue and expenses. Consider a monthly or quarterly review by your Board to determine the progress of your budget according to your plan. A good budget should show the costs of general administration and the costs of specific projects.

Consider a contingency fund to allow some flexibility during your budget year. Special projects may arise that you cannot foresee while preparing a budget. A contingency fund enables you to deal with these unforeseen needs.

An auditor will assist the board's financial officers with accounting practices. In some cases, Ottawa for example, accounting and financial services are provided by the municipality. Your auditor should be able to suggest appropriate systems and will often provide help with budget and financial statement preparation.

Three factors should be considered in establishing a BIA budget, particularly for the first year of operation.

1. Budgeting in the first year may be somewhat erratic. Remember, however, that you must start somewhere. To assist in projecting costs, Ontario BIA's approach contractors, consultants, advertising agencies and any other relevant parties such as municipal staff. Your municipal engineer, for example, may be able to provide cost estimates for street improvements. Have your committees research and identify the cost of undertaking the activities they are directly involved with.
2. Be careful not to underbudget. This will result in some projects not being completed in that year, will undermine credibility, and may result in a substantial budget increase for the following year if uncompleted projects are carried over and added to new projects. It is better to be left with a budget surplus at the end of a year rather than an incomplete list of project activities.
3. Include and attach cost figures in a separate column to volunteer labour and donations of material and space. These may not be available in future years and will need to be included in future BIA budgets. Grant monies received for various projects should also be included to illustrate that other sources of funding are being tapped wherever possible. This will make the levies imposed on BIA members more palatable.

Budgets, the Process to Follow

1. Committees discuss and decide what it is they want to achieve in the coming year.
2. Committee chairmen make presentation to the Board of Management.
3. The Board discuss all committee programs and make a decision on what will or will not be included in the budget. The committees may be asked to review their program of activities and come back to the Board with a smaller or greater budget figure.

Remember

The Board should follow the direction they have approved and adhere to policies and, maintain and build on the image they have adopted.

4. The budget is then prepared in the following manner.

Top page - list total budget, and breakdown for all areas within the budget.

Support pages - attach a back up sheet for each area of the budget that appears on the top page.

5. Have the Board review this format and approve it for presentation to the membership.
6. Call a membership meeting.
7. Have copies of the budget ready to hand out to those who attend meeting. (have enough copies)

Presenting the Draft Budget

Have the BIA Chairman present the overall budget and explain the direction the Board will be taking. The chairman calls on the committee chairmen to individually present the area of the budget they are responsible for, i.e. promotion chairman reports on the promotions for the year and explains what budget figure is needed.

The chairman should then give another brief overview and accept any questions from the members.

Ask the members for a vote of approval. Record this in the minutes of the meeting.

Once the budget is adopted by the Board, the chairman can forward it along to council for their approval.

It is advisable to meet with the municipal Treasurer prior to the budget being prepared to find out and agree on the following:

- when does council need the budget
- what format does your budget need to be in for council
- when will the budget be approved by council
- while it's being approved, can council give the BIA some funds in advance to operate with
- how will the municipal Treasurer deal with BIA write-offs and supplementaries

Once the budget is approved, have your Board treasurer prepare a financial statement for each Board meeting. Have these statements approved by the Board by a motion and record this in the minutes. Also, attach a copy of the statement to the minutes.

By the end of October, repeat the same process

Committees review programs and assign budget figures to each program.

Summary

Remember the four basic steps:

1. Board adoption/endorsement
2. Membership review
3. Budget to council
4. Monthly financial statements, regular reporting, monitoring

Refer to Appendix B III for sample BIA budgets.

Communications

Effective communications are essential to a successful BIA.

An effective communications program involves both short-term and long-term goals, and is directed at a variety of different audiences: the local media, service clubs, other business groups, and your own members.

While the details will vary from one BIA to the next, the general pattern will be similar in most BIAs.

Media

- Establish a close working relationship with your local media. Cultivate these contacts, send them your newsletters, call them regularly.
- Provide regular access to a BIA spokesman for comments on budgets and news in the retail/service industries.
- Issue press releases to announce events, plans and progress.
- Look for interesting pictures to promote your events.
- Use local radio talk shows or TV channels wherever possible to promote the positive changes occurring in your BIA.
- Invite them to your events.

Other Organizations

Community events serve to personalize BIA promotions and help local people associate their BIA as a positive community influence. For example, many BIA's give their support to local charities.

Try to keep a regular contact with other local resource groups. Service clubs, schools and other business groups can often be counted upon to participate in BIA programs.

Communicating with your BIA members

- Try to involve and inform your members as much as possible.
- Develop a forum where your BIA members can express their ideas.
- Involve non-retailers as much as possible.
- Produce a newsletter on a regular basis.
- A block captain program will provide you with a sound, informal way of communicating with your members and soliciting their feedback.

Communicating with council

- Present your newsletters to Councillors - personally.
- Present your Action Plan and budget to Council each year.
- Meet with Council every six months to discuss your progress - solicit their advice.
- Invite councillors to Board meetings.
- Liaise with municipal staff regularly for information exchange.
- Find out who is responsible and what the processes are to undertake specific projects such as street closures, special events permits, vandalism control, etc.
- Don't be afraid to ask for help, your objectives will often benefit Council, for a successful BIA is a credit to the entire community.
- Present Council with copies of the studies you undertake, your constitution, Annual reports, etc.
- Thank helpful politicians IN PUBLIC.

Appendix I Sample Year End Report

Following is an example of a short-form report statement requested by the City of Ottawa of its BIA's. Many BIA's provide a subsequent report showing more detailed information.

Sample Business Improvement Area Year-end Report

Name of B.I.A.

Name of Manager/Director

Person completing this form

Date of completion

- A. Please give a brief summary of last year's activities. (i.e. promotional activities, streetscaping, other projects)
- B. Please give a short statement of objectives for the present year. (projects planned, major thrust of your promotions, etc.)
- C. Please attach your 1985 Financial Statement
- D. Please list your current board of management and executive members.

Oshawa's BIA produced a larger example which is contained within the Peter Barnard report Towards Excellence in Downtown Management, available from the Ministry of Municipal Affairs.

Source: The City of Ottawa Economic Development Department

Appendix II Sample Constitution

CONSTITUTION

BOARD OF MANAGEMENT FOR THE EXETER CENTRAL BUSINESS DISTRICT IMPROVEMENT AREA

Title

1. Head Office
2. Board of Management
3. Vacancies in the Board
4. Quorum of the Board and Special Meetings
5. Errors in Notice
6. General Meeting of the Board
7. Voting of the Board
8. Power of the Board
9. Remuneration
10. Officers of the Board
11. Duties of the Chairman, and Vice-chairman
12. Duties of the Secretary
13. Information Circular
14. Duties of the Treasurer
15. Duties of Other Officers
16. Execution of Documents
17. Books and Records
18. Adjournment
19. Attendance at Regular Meetings of Board
20. Financial Year
21. Cheques, etc.
22. Interpretation

1. Head Office

The Head Office of the Board of Management and the meeting Place of the Board of Management for all regular meetings shall be the Town of Exeter Municipal Offices on Main Street South, Exeter, Ontario and such other place as the Board of Management shall from time to time designate. In the Event the Board of Management designates any other location for the Head Office and meeting place of the Board of Management written notice shall be forwarded to all of the members of the Board of Management by the secretary and written notice shall be forwarded to all of the businessmen and members in the Exeter Central Business Improvement Area.

2. Board of Management

The Board of Management as established by By-law 23-76 of the Corporation of the town of Exeter shall consist of a minimum of five members and a maximum of seven members appointed by the Council of the Corporation of the Town of Exeter one of which members shall be a member of the said Council and the remaining members shall be persons qualified to be elected members of Council assessed for business assessment in respect of land in the area or nominees of the corporation so assessed. Each member of the Board of Management shall hold office for a period of one year from the time of appointment provided he continues to be qualified to be elected as a member of Council for the Corporation of the Town of Exeter assessed for business assessment in respect of land in the area or nominees of the corporations so assessed. Members of the Board of Management shall hold office until their successors are appointed and are eligible for reappointment on expiration of their term of office.

3. Vacancies in the Board of Management

Where a vacancy occurs in the Board of Management from any cause the Board of Management shall report the vacancy to the Council of the Corporation of the Town of Exeter and, in accordance with paragraph 6 of By-law No. 23-76 of the Corporation of the Town of Exeter, request that the Council of the Corporation of the Town of Exeter appoint a person qualified to be a member of the Board of Management in accordance with paragraph 4 of By-law No. 23-76 of the Corporation of the Town of Exeter and amendment thereto.

4. A Quorum of the Board of Management and Special Meetings

A quorum of the Board of Management shall comprise a majority of the number of persons who are regular members of the Board of Management duly appointed by the Council of the Corporation of the Town of Exeter. The Board of Management shall hold all of its regular meetings at the Head Office and meeting place of the Board of Management and at such other place or places as the Board of Management may from time to time determine. Regular meetings of the Board of Management shall be held on the third Thursday of each and every month at 7:30 p.m. and no notice shall be required for any regular meeting. Special meetings of the Board of Management may be held from time to time as determined necessary by the Board of Management and shall be held at such time and place as shall be determined by the Board of Management and notice of all special meetings shall be given to all members of the Board of Management and, if necessary the businessmen in the Exeter Business Improvement Area.

No formal notice of any special meeting of the Board of Management shall be required if all the members of the Board of Management are present at the meeting or have signified in writing to the Chairman of the Board of Management their consent to any special meeting being held in their absence. Notice of special meetings shall be delivered, telephoned, telegraphed or posted to each member of the Board of Management not less than three days before the special meeting is to take place. The Board of Management may transact or conduct any business properly brought before the Board of Management at any regular or special meeting of the Board of Management. The statutory declaration of the secretary or the chairman at any special meeting that notice has been given for the special meeting pursuant to the constitution will be sufficient and conclusive evidence of the giving of such notice.

5. Errors in Notice

No error or omission in giving notice for any meeting of the Board of Management shall invalidate such meeting or invalidate or make void any proceedings taken or had at such meeting and any member of the Board of Management may at any time waive notice of any such meeting and may ratify and approve of any and/or all proceedings taken or had thereat.

6. General Meeting of the Board of Management

The Board of Management shall in each year designate one of its regular meetings as a General Meeting and shall notify in print either by advertisement in a local newspaper or by posted bulletin all members of the Board of Management and all businessmen and members of the Exeter Central Business Improvement Area of the date, time, place of this meeting. Such notice shall be at least ten days prior to the date of such meeting. The Board of Management shall prepare a full slate of persons which the Board of Management has by vote decided to recommend to the Council of the Corporation of the Town of Exeter as members for the succeeding Board of Management. At the General Meeting the chairman or person acting as chairman or vice-chairman of the Board of Management shall specify from the members of the Exeter Central Business Improvement Area a nomination chairman. The nomination chairman shall be provided with the slate of previous aforesaid prepared by the Board of Management and thereafter request that further nominations be made of persons wishing to be appointed to the Board of Management from any of the members of the Exeter Central Business Improvement Area. When all nominations have been received the chairman shall close the nominations and proceed to conduct a vote to determine six persons who will be recommended to the Council of the Corporation of the Town of Exeter as members of the next Board of Management. In event there are six or fewer nominees no vote shall be required. After the vote if any the nomination chairman shall advise the Board of Management of the six persons to be recommended and the Board of Management shall in writing so advise the Council of the Corporation of the Town of Exeter. The Board of Management may conduct at any General Meeting any business usually conducted at any regular meeting and any other business properly brought before the Board.

7. Voting of the Board of Management

Questions arising at any meeting of the Board of Management shall be decided by a majority of votes. In the case of an equality of votes the chairman, in addition to his original vote, shall have a second or casting vote. All votes at any such meetings shall be taken by ballot as so demanded by any member of the Board of Management present, but if no demand is made the vote shall be taken in the usual way by assent or dissent. A declaration by the chairman that a resolution has been carried and an entry to that effect in the minutes shall be admissible in evidence as prima facie proof of the fact without proof of the number or proportion of the votes reported in favour of or against such resolution. In the absence of the chairman his duties may be performed by the vice-chairman or such other member of the Board of Management that the Board of Management may from time to time appoint for the purpose.

8. Powers of the Board of Management

The Board of Management shall have those powers conferred on it by By-law 23-76 of the Corporation of the Town of Exeter and such other powers as may be incidental to or necessary to give full force and effect to those powers set out in the above mentioned by-law.

9. Remuneration

The Members of the Board of Management shall receive no remuneration for acting as such.

10. Officers of the Board of Management

In accordance with paragraph 8 of By-law 23-76 of the Corporation of the Town of Exeter there shall be elected a chairman, a vice-chairman, secretary, treasurer, or in lieu of a secretary and treasurer a secretary-treasurer and such other officers as the Board of Management may from time to time determine. A member of the Board of Management may hold more than one office, except for the office of chairman. The chairman and vice-chairman shall be elected by the Board of Management from among its members at the first meeting of the Board of Management after the appointment of members to the Board by the Council of the Corporation of the Town of Exeter. Provided that in default of such appointments, the then incumbents being members of the Board of Management shall hold office until their successors have been appointed.

11. Duties of the Chairman and Vice-chairman

The chairman shall when present, preside at all meetings of the Board of Management and any meeting of Exeter Central Business Improvement Area as may be called from time to time. The chairman shall also be charged with the general management and supervision of the affairs and operation of the Exeter Central Business Improvement Area. The chairman with the secretary or other officer appointed shall sign all by-laws duly passed by the Board of Management and prepare an agenda for all meetings of the Board of Management. During the absence or inability of the chairman his duties and powers may be exercised by the vice-chairman and if the vice-chairman or such other member as the Board of Management may from time to time appoint for the purpose, exercises any such duty or power the absence or inability of the chairman shall be presumed with reference thereto.

12. Duties of the Secretary

The secretary shall be an appointed member of the Board of Management. He shall attend all meetings of the Board of Management and all meetings of the Exeter Central Business Improvement Area as may be called from time to time by the Board of Management. The secretary shall record all facts and minutes of all proceedings in the books kept for the purpose and shall give all notices required to be given to members and the secretary shall be the custodian of all books, papers, records, correspondence, contracts and other documents belonging to the Board of Management and Exeter Central Business Improvement Area, which the secretary shall deliver up only when authorized by a resolution of the Board of Management to do so and to such person or persons as may be named in the resolution. The secretary shall perform such other duties as may from time to time be determined by the Board of Management. The secretary shall also assist the chairman to prepare an agenda for all meetings.

13. Information Circular

The Board of Management shall appoint from among its members a person to act as chairman of a committee to be responsible for transmitting, reporting, or otherwise advising all of the members of the Exeter Central Business Improvement Area of decisions of the Board of Management and any other information concerning the Board of Management and the Exeter Central Business Improvement Area. Such information shall be in written form as determined by the Board of Management and shall be transmitted at such intervals and times as the Board of Management shall determine.

14. Duties of Treasurer

The treasurer or persons performing the usual duties of the treasurer shall keep full and accurate accounts of all receipts and disbursements of the Board of Management in proper books of account and shall deposit all monies or other valuable effects in the name of, and to the credit of the Board of Management in the same bank as that used by the Corporation of the Town of Exeter. He shall disburse the funds of the Board of Management under the direction of the Board of Management, taking proper vouchers therefor and shall render the Board of Management at the regular meeting thereof or whenever required an account of all transactions as treasurer, and of the financial status of the Board of Management. The treasurer shall also perform such other duties as may from time to time be determined by the Board of Management.

15. Duties of Other Officers

The duties of all other officers of the Board of Management shall be such as the terms of their engagement call for or the Board of Management requires of them.

16. Execution of Documents

Contracts in the ordinary course of operations of the Board of Management may be entered into on behalf of the Board of Management by the chairman, vice-chairman, secretary or treasurer or by any other person authorized by the Board of Management. Contracts or engagements on behalf of the Board of Management shall be signed by either the Chairman or the vice-chairman together with the secretary or treasurer. Notwithstanding any provisions to the contrary contained in By-law No. 23-76 of the Corporation of the Town of Exeter, the Board of Management may at any time by resolution direct the manner in which the person or persons by whom any particular instrument, contract or obligations of the Board of Management may or shall be executed.

17. Books and Records

The directors shall see that all necessary books and records of the Board of Management required by the by-laws of the Board of Management or by any applicable statute or law are regularly and properly kept. These records when not in use shall be filed in a suitable cabinet or drawer in the office of the Corporation of the Town of Exeter.

18. Adjournment

Any meeting of the Board of Management may be adjourned to any time and from time to time and such business may be transacted at the original meeting from which such adjournment took place. No notice shall be required of any such adjournment. Such adjournment may be made notwithstanding that no quorum is present at the meeting being adjourned.

19. Attendance at Regular Meetings of the Board of Management

All members of the Board of Management shall attend all regular meetings of the Board of Management and any adjournment of any regular meeting. If any member of the Board of Management is absent for any reason whatsoever from three or more regular meetings or adjournment thereof of the Board of Management during the year that member holds office on the Board, the Board of Management shall by majority vote determine whether or not to request that Council of the Corporation of the Town of Exeter ask the member to submit his resignation as a member of the Board of Management. If the Board so determines it shall transmit the request in writing to the Council of the Corporation of the Town of Exeter.

20. Financial Year

The fiscal year of the Board of Management shall be the calendar year.

21. Cheques, etc.

The treasurer shall sign all cheques issued in the name of the Board of Management, or in his absence the chairman may sign cheques, however in so doing the chairman shall make full disclosure at the following regular meeting of the Board of Management of any cheques he may have issued for the said Board.

22. Interpretation

In this constitution and in all other amendments and additions hereafter passed unless the context requires words importing the singular number or the masculine gender shall include the plural number or the feminine gender as the case may be, and vice versa and references to persons shall include firms and corporations.

Appendix III Sample BIA Budgets

	Proposed <u>'87 Budget</u>	Actual <u>'86 Budget</u>	Proposed <u>'86 Budget</u>
<u>REVENUE</u>			
Levy	_____	_____	_____
Term Deposit Interest	_____	_____	_____
Special Programs (dining guides co-op flyers)	_____	_____	_____
<u>EXPENDITURES</u>			
Administration	_____	_____	_____
Promotion	_____	_____	_____
Advertising	_____	_____	_____
Beautification	_____	_____	_____
Parking	_____	_____	_____
Write-Offs/Supplementaries	_____	_____	_____
Total	=====		

	<u>Proposed '87 Budget</u>	<u>Actual '86 Budget</u>	<u>Proposed '86 Budget</u>
<u>ADMINISTRATION</u>			
Staff	_____	_____	_____
Secretarial Assistance	_____	_____	_____
Meetings	_____	_____	_____
Printing	_____	_____	_____
Postage	_____	_____	_____
Telephone	_____	_____	_____
Rent	_____	_____	_____
Audit	_____	_____	_____
Office Expense	_____	_____	_____
Office Equipment & Rental	_____	_____	_____
Other	_____	_____	_____
Total	=====		

	<u>Proposed</u> <u>'87 Budget</u>	<u>Actual</u> <u>'86 Budget</u>	<u>Proposed</u> <u>'86 Budget</u>
<u>PROMOTION</u>			
Newsletter	_____	_____	_____
Spring Promotion	_____	_____	_____
Sidewalk Sale	_____	_____	_____
Summer Promotion	_____	_____	_____
Fall Promotion	_____	_____	_____
Christmas	_____	_____	_____
Christmas Parade	_____	_____	_____
Directory	_____	_____	_____
Tourism	_____	_____	_____
Antique Market	_____	_____	_____
Other	_____	_____	_____
Total	=====		

SAMPLEMONTHLY FINANCIAL STATEMENT
REVENUE & EXPENDITURES

	<u>Proposed</u> <u>'87 Budget</u>	<u>Actual</u> <u>'86 Budget</u>
<u>REVENUE</u>		
Town:		
Levy		
Supplementaries		
Term Deposit Interest		
Special Programs, i.e. dining guides co-op flyers		

EXPENDITUREAdministration

Staff
Secretarial Assistance
Meetings & Seminars
Printing
Postage
Telephone
Rent
Audit
Office Expense
Office Equipment & Rental

Promotion

Newsletter
Spring Promotion
Sidewalk Sale
Midnight Madness
Fall Promotion
Christmas
Christmas Parade
Directory
Antique Market
Canadian Open

Advertising

Image
Co-op
Posters

SAMPLE (Cont'd)

	Proposed <u>'87 Budget</u>	Actual <u>'86 Budget</u>
EXPENDITURE (Cont'd)		
<u>Beautification</u>		
Services		
Purchases		
<u>Parking</u>		
Taxes Written Off		
Budget Total		

2. Planning

Introduction

"People don't plan to fail, they just fail to plan."

Planning is the process of determining how the organization will be structured, where it wants to go, how it intends to get there and what resources and options are available to help it reach its goals.

Developing an Immediate Action Plan

A plan for immediate action can help to maintain interest and enthusiasm in a newly-formed BIA, or to rejuvenate an established BIA. Additional interest is generated and new recruits can be obtained once people see that "things are happening". Immediate actions provide for immediate results.

The most effective means of planning, as well as implementing each objective, is to assign the responsibility to a subcommittee or individual whose primary function will be to:

- plan specific short term actions
- carry out these actions
- monitor the actions
- report to the Board of Management

Ideally, a subcommittee provides a greater opportunity for planning and undertaking short term actions because more people are involved. Since the responsibility can then be shared, the task does not become too onerous for any one individual.

On the other hand, an enthusiastic, hard working individual may be capable of achieving just as much as a subcommittee comprised of two or more persons. The structure you choose will be dependent upon your human resources.

Merchants and businesspeople represent a good potential source of subcommittee members. Being part of a subcommittee provides an ideal method for organizing businesspeople and involving them in the revitalization program.

The immediate actions are generally geared towards stimulating retail sales and other activities as well as interest in the BIA and are of direct benefit to these businesspeople. They are appropriately and best suited, therefore, to undertake the actual work.

It should be remembered that, although these subcommittees or individuals are being assigned the responsibility for an action stream to "get the ball rolling" by taking immediate action, they also provide a structure which can "keep the ball rolling" by ultimately assuming the responsibility for implementing and monitoring long term actions. The development of short term strategies provides a training ground for the longer term.

You must identify and prioritize your greatest needs and problem areas and allocate your resources accordingly. In some instances, where support and resources are very limited, the onus may fall exclusively on the Board to plan and undertake specific projects.

Regardless of who assumes responsibility for specific actions, the process described provides a useful sequence and structured methodology for undertaking immediate action - it provides a starting point.

Through the internal organization network suggested, a foundation for implementing a future action plan is also provided. You must remain flexible, however, and tailor the process to suit your own needs.

The 4-step Short-term Action Plan

What to do? Here are some suggestions to consider:

1. Identify the needs of your BIA. Brainstorm ideas to make your area successful. Look at your competition, your customers and your members to understand your place in the market, the needs you should address and the major areas of concern.
2. Priorize the ideas you've culled into realistic, attainable goals and objectives. Understand your written goals over a 5-year plan.
3. Make sure you have an effective organization in place. Your membership must feel involved in your BIA's decision-making process. Keep them informed. Allow them to input their ideas/suggestions.
4. Your activities over the year should contain some or all of these elements:
 - (a) Give your members something for their money. Low cost, high profile ideas will work best for you.
 - (b) Tell the community you're alive and what you do. Build an image.
 - (c) Sell the BIA concept to your members and to council.
 - (d) Decide on a long-term direction for your BIA, i.e. business development, core recruitment, tourism, streetscaping, marketing plan.

Examples

1. Give your members something for their money.

Here are some ideas to help you remind your members of the immediate, tangible benefits that flow from the BIA.

Beautification:

- Don't forget to put your logo on all the items mentioned below. You want people to know who provided these convenient street amenities.

- Bike Racks
 - Garbage receptacles
 - Flags/banners for colour and animation
 - Flowers and flower barrels
 - Benches
 - Christmas decorations
 - Signage at linkages
 - BIA signs on existing street amenities
- For every beautification item, remember to address its maintenance requirements. The human and financial implications must be carefully considered to ensure the future commitment to maintaining these improvements is kept.

Maintenance:

- Make sure planters are filled with plants, not garbage.
Ensure regular garbage pick-up at a convenient time for everyone.
- Inform BIA members/tenants of refuse pick-up times and ensure their cooperation. Garbage put out the evening before collection often gets kicked around and creates a mess!
- Snow removal, removal of ice from sidewalks
- Store Fronts (Clean windows, flush sidewalks)
- Parking lots, safety, security (lighting)

Parking:

- Resolve the issue of employees using on-street parking: educate through your newsletter and the media.
- Parking Guides: free to customers, free to merchants. Self sustaining: sell advertising space to BIA members. Encourage use as bag stuffers, flyers, giveaways. Ensure displays in prominent store and bank locations.
- Check signage: take down old signs, repaint, address visual confusion.
- Key signage in lots

Promotion:

- Research, marketing: use students from local colleges and schools to develop and undertake market studies, surveys.
- Christmas Promotions
- Sidewalk Sale
- Co-op vehicles: flyers, tabloids, jingles
- Introduce businesses new to the BIA

2. Build an image

With the Media:

- Always be positive. Talk things "Up"
- Cultivate your media contacts
- Provide access to members for surveys/opinions
- Issue press releases to inform the public of:
 - New programs
 - Progress toward BIA objectives
 - Events, attractions
 - Create media events, photo opportunities: make them interesting for better coverage
 - Radio talk shows: Be upbeat and positive
 - Local TV channels

With Service Clubs:

- Visit them and explain the BIA concept
- Discuss your plans/objectives
- Solicit their support/involvement in as many ways as possible. They can put on special events for you ie. Casinos, runs for charity, pancake breakfasts etc. to raise money for their charity. These events, tied in to your special promotions, make good feature attractions.

Through Schools/Colleges:

- Visit regularly and explain the BIA concept
- Today's kids are tomorrow's consumers
- Involve them in special events ie. hoarding painting, doing customer surveys, market studies, face painting during special events, etc.
- Create and utilize regular opportunities to familiarize your community with your BIA

3. Sell the BIA Concept to Your Members and to Council.

Involve and inform your members!

- Develop a forum where members can express their ideas: coffee clubs, hot-line, breakfast clubs, through the newsletter, through committee, etc.
- Involve non-retailers: on your Beautification/Parking committees and through professional seminars (tax tips, etc.)
- Develop and adopt a logo which represents your BIA

- Place the logo, in decal form, on BIA doorways to welcome people to the area
- Produce a newsletter on a regular basis
 - use it to advise members of meetings
 - discuss objectives and progress
 - solicit their feedback
 - advise of programs, i.e. Special garbage collection during holidays
 - use it to educate your members ie: staff selling tips, etc
- Discuss:
 - Employee on-street parking
 - Special mention of Award winners
 - Introduce new BIA members
 - Update on committee activities
 - Include committee/Board names and phone numbers in your newsletter.
- Try to develop a block captains system to help spread the word about BIA's and use to solicit feedback, informal polls.
- Hold monthly meeting (breakfast or coffee)
- Encourage constructive input from all individuals

Involve and inform council!

Realize that the BIA is a creature of council and that their support is very important. Understand that their priorities differ from yours and that you will sometimes have to lobby them to see your point of view. Keep your relationship positive!

- hand them your newsletters - in person!
- present your budget to them and explain your goals and objectives
- solicit their ideas and suggestions
- cultivate a positive atmosphere - don't only see them over the opposing end of an issue!
- keep them informed on a regular basis

4. Decide on a direction for your BIA

Take time to discuss what direction your BIA will be taking. Understand the plan of action for your BIA and regularly chart its progress.

Make sure that your plan is well-rounded, that it covers the many needs of the BIA. Allow for flexibility.

Evaluate your projects and continually refine your programs to improve upon them.

Advantages of a Written Plan

Always write your plans down and keep them in a separate file for easy referral. It is not enough to keep an informal plan "in your head". A written plan offers many advantages, among them:

1. Assists by forcing you to clarify areas that are ambiguous.
2. Serves as a basis for delegating specific activities.
3. Serves as a control instrument.
4. Assists you to justify your use of time and resources in achieving high return activities.
5. Serves as a handy reference available for consultation at any time.
6. Helps you to determine and justify needs for additional resources (personnel, equipment, etc.)
7. Assures continuity: although Boards may change, the plan remains as a guideline.

Sample Short Term Plan

COMMUNICATIONS: Internal and External

- Newsletter (Internal)
- Annual General Meeting (Internal)
- Improved Press Coverage (External)
- Annual Report (External and Internal)

BEAUTIFICATION AND MAINTENANCE

- Welcome Signs
- Educate tenants/members about garbage pick-up times
- Spring Clean-up of the downtown
- Streetscaping Study

PARKING

- Parking Guides
- Encourage employees to use off-street parking
- Improved lighting in municipal parking lots
- Improved linkages between parking lots and the street

PROMOTION & MARKETING

- Sidewalk Sale
- Christmas Festival
- Marketing Study
- Long-term Marketing Plan

As each goal is agreed upon, and objectives are determined to reach these goals, a process should be followed to "flesh-out" each objective. A Sample Process Form for Action Plans follows. Fill the form out for each objective you consider. As this process is applied, some objectives will be dropped; they will be seen as either too costly, labour-intense or complicated and involved.

The combination of all the Process forms and accompanying budget requirements plus the BIA's administrative costs will determine the final budget. The final budget is inextricably linked to the Board's plans for the year.

Sample process form for action plans

ESTABLISH THE NEED:

- Purpose.
- Potential benefits.

OBJECTIVES:

- Does the objective reflect the need?
- The Goal is "where you want to be", the objective should explain "how you intend to get there".

METHODOLOGY:

- Attach time frames to all actions planned.
- Address manpower requirements and delegate responsibilities.
- Consider publicity and promotion.
- Organizational Structure.

BUDGET:

- Funding opportunities.
- Co-sponsorship.

TIME FRAME:

- Start date.
- Duration, progress report dates.
- Completion date

EVALUATION

- How: by block captains, committees, surveys, media coverage, sales, traffic count, etc.
- Keep a record of ideas to improve the project for next year's organizers.

For each objective you consider fill out the process form to more fully understand the advantages, disadvantages and necessary commitment of the objective. If you determine that the problem need is not being met by the objective, or the budget is too high, or commitment of manpower too demanding, then consider changes or reject the objective and consider your next idea.

Your resultant Action Plan will be a compilation of individual process forms. The combined budgets plus administrative costs will constitute the Board's total budget for the year.

The Forms are guidelines only and will be embellished by the committee as they are implemented.

Sample Short Term Action Plan

Goal:

Produce BIA Newsletter

Establish the Need:

Need vehicle for regular communication with members.

Objectives:

Introduce new members

Inform members of Board and committee meetings.

Use newsletter to solicit feedback.

Include review of committee activities.

Include Board names and phone numbers.

Methodology:	Responsibility	Report by
Printing, costs, format	Sharon K.	Sept. 9th
Content: write & solicit text, edit	Sarah H.	Aug. 15th
Distribution: method, costs, options	Allan F.	Aug. 30th
Evaluation format	Linda P.M.	Aug. 30th

Budget:

Those responsible for different areas to submit financial requirements to Ralph D. who will prepare and present a tentative budget, not to exceed \$1,500.00 at the Sept. 9th meeting. Ralph to investigate other funding.

Timeframe:

First newsletter to be produced and distributed by October 1st. Newsletter will be produced monthly.

Evaluation:

Short survey will be prepared and distributed to selected group to evaluate the newsletter.

Comments and suggestions of all BIA members will be solicited through the newsletter.

Developing a Long-term Action Plan

Three important steps must be undertaken in developing a strategy for future actions. These steps include:

- Analyzing the problem
- Identifying a viable solution
- Developing an implementation strategy (plan for action)

Each step is described as follows:

- **Analyze the Problem** - Analyzing and thoroughly understanding the problem is necessary for identifying a meaningful, and, therefore, viable solution. Your analysis should consider the consumer, the competition and your BIA.
- **Identify a Viable Solution** - The type of viable long term solution selected should be comprehensive and include both economic revitalization and a plan for physical improvements. To succeed, a sympathetic municipal climate is essential as is evidenced by successful BIA programs developed in other communities.
- **Develop an Implementation Strategy** - A well thought out solution to your BIA's problems will permit the development of implementation strategies which can be translated into concrete actions. Many of these actions will be long term in nature.

Some short term actions, in addition to those already planned by the subcommittees, may also be identified. Most general actions can be broken down into specific short and long term actions. The actions should be prioritized and responsibilities assigned. The finance subcommittee must play a vital role in prioritization. The implementation actions should be grouped according to the components and sub-components of BIA revitalization. This will make the job of meshing these actions with the short term actions either planned, completed or underway, easier. The task of assigning responsibility will also be made easier.

The Board or committee must develop a process for undertaking the work necessary for analyzing the problem and developing a viable solution. From the solution will stem the implementation strategies. These implementation strategies should be developed for all of the components (and subcomponents) of BIA revitalization.

Because long term actions or implementation strategies will require a long term commitment and some expense, it is essential that the problems of your BIA be thoroughly understood and the solution and follow-up actions be well thought out.

A group of qualified professionals may be required to undertake the work necessary for developing a viable solution and then translating that solution into a meaningful concept and a plan for action.

3. Meetings

Introduction

With no problem at all, the average BIA manager or Board member can tie up three or more nights and an equal number of lunch hours a week. Some meetings are productive, most are not. There is a significant amount of wasted effort and time due to poor organization, weak leadership, trivial agendas and a restless membership.

More planning should go into meetings. In the first place, they should have a specific goal or they should be postponed until there is something worthwhile to discuss. If the staff person is placed in charge of a meeting - as often happens - make sure there are some teeth in the agenda. If possible, send the agenda out to members in advance. Give them a chance to study it. You might even add some special readings as background material. This way people will be primed for discussion.

Put someone in charge of the meeting who will move things along. This takes skill and tact. You don't want this person to appear authoritarian, but you need someone who can summarize, proceed speedily toward votes, cut off senseless discussion.

Also pick a suitable meeting place where speakers can be seen and heard and where members feel free to participate. Hot, crowded conditions make for a surly audience, and even the most reasonable proposals may be shot down.

A knowledge of parliamentary procedure is a necessity. You may not want to invoke Robert's Rules of Order at every opportunity, since this may cow some members and irritate others. When things threaten to get out of hand, however, parliamentary procedure can be used to restore discipline. However, in general, meetings involving volunteers are run informally, in a relaxed atmosphere which is designed to cultivate participation and enjoyment of the meetings and workload by BIA members.

Always announce meetings well in advance, and if time and numbers permit, use a calling committee for last-minute reminders. If you know that the agenda will not require extended discussion, you should set some target hour for dismissal and work towards it.

Be familiar with your BIA's constitution, particularly sections that describe the number of mandatory meetings, the attendance required to constitute a quorum, and similar items.

As soon as possible after a business meeting has been concluded, work on whatever tasks the members have assigned to you. If you are also the secretary, write the minutes up almost immediately and get them to members. There is no better way to impress your colleagues.

Finally, don't forget to use the normal publicity routes to let members know of meetings and to convey news of any significant happenings.

*Source: Reilly, Robert T., Public Relations in Action, Prentice-Hall, 1981.

10 Guidelines for Successful Meetings

These suggestions will improve the productivity of meetings by guiding them in such a way that definite decisions are reached and positive action taken.

As directors and committee members, your role is especially important and you can assist in making the meetings as successful as possible by observing the following suggestions:

1. When an agenda is issued prior to the meeting, study it carefully. If there is any item on it you don't completely understand, then contact the Chairman or Executive Director and ask to be briefed.
2. During the meeting, stick to the agenda. Offering subjects for discussion not appearing on the agenda impedes the meeting. When the Chairman asks for the agenda to be adopted, raise your points then under "Discussion", or "New Business".
3. When you speak, make certain everyone is listening, you cannot offer your remarks against half a dozen side conversations. The Chairman will ensure that an attentive atmosphere exists.
4. Side conversations inhibit the business of the meeting. Whispers are distracting and should be avoided.
5. If your comments are lengthy or involved, sum them up at the end of your discussion. Someone may have forgotten your objective before you have finished.
6. Should discussions arise on subjects that require further study or research, terminate them with a motion for further study. This is the best method of moving the meeting along and problem solving rather than dealing with decisions that need more input.
7. Don't hesitate to comment, criticize constructively or disagree. Know your subject and ask for support from directors who feel as you do.
8. If you disagree with the views of a fellow director, comment at the proper time.
9. If you have a comment, ask for the floor, rather than joining in an aimless group discussion. If what you have to say is a genuine contribution, don't let it be lost in the general conversation.
10. If points of view differ, ask for others to summarize their convictions. This permits a more thorough examination of an idea that could be highly constructive when completely understood.

C. ACTIVITIES

- 1. MARKETING**
- 2. ADVERTISING**
- 3. PROMOTION**
- 4. TOURISM**
- 5. RECRUITING NEW
BUSINESSES**
- 6. PHYSICAL
IMPROVEMENTS**

C. ACTIVITIES

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1. Marketing

Introduction

Marketing in a BIA must be considered at two levels. First, individual merchants must evaluate present marketing practices and formulate new techniques. Second, the individual efforts of merchants must be coordinated to form a collective strategy which markets the BIA as a single cohesive unit.

Evaluating present marketing practices as well as making changes, updates and improvements to these practices, is a difficult task for most individual BIA merchants to undertake. The problem is compounded by the strongly independent nature of the small businessman who may be adverse to accepting new ideas and advice.

But the advent of today's convenient shopping centre form of retailing and modern chain stores have made it necessary for independent merchants to consider new marketing techniques which will enable them to compete on more equal terms. This is the essential purpose of a Business Improvement Area.

In considering marketing techniques, however, it is important to remember one of the BIA's greatest attributes which stems from the strongly independent and individualistic nature of core merchants. Unlike retail outlets in shopping centres, BIA stores reflect the personality of the owner. This is what makes a BIA interesting, special and unique. It is well worth preserving. Merchants must be prepared to take the initiative and investigate new product lines, new marketing techniques and new trends and fashions which pertain to their particular business.

Although each individual merchant must approach marketing in his own way to meet his specific requirements, there are seven common elements involved in every assessment of retail marketing programs and in the development of new marketing methods. The seven are:

- collection of data
- development of a marketing approach
- assessing products
- assessing prices
- development of appropriate store interiors
- developing proper service
- developing a collective marketing strategy.

Each of these is considered individually in the following sections.

Gathering Background Data

The merchant and the BIA must know who their customers are, what segment of the market they want to attract and what that segment needs and demands. General marketing information gathered through surveys will provide this information. You need to gather background data to understand your marketplace and your position in it.

The Retail Council of Canada, in their publication Strategic Retail Marketing has developed a number of charts which can be used in an overall evaluation of your local market.

Develop a Unique Marketing Strategy

In appendix C I at the end of this chapter you will find a number of checklists which will help you determine the elements of your marketing strategy.

The checklist requires you to determine which market segments your efforts will focus on, and assign priorities to each. It asks you to identify such factors as geographic location, lifestyle, income level, sex, and age of your target audience, and to determine the elements which will give you an advantage over your competitors in reaching this audience. Finally, you will be required to identify the methods to be used in capturing this market, and the resources which will be made available to do so.

Example: In order to achieve a 20% sales increase, the Happytown BIA will:

1. Focus on the traditional adult, female, middle to better income shopper (with secondary emphasis on the young, contemporary female market segment);
2. The BIA will do this by:
 - encouraging merchants to improve in-store presentations, packaging, and window displays (through seminars);
 - featuring quality in communications.

This will be supported by:

- hiring a design group to develop a new logo; imaging; and
- re-allocating 20% of advertising funds to reach contemporary customers.

Products

The merchant must tailor his product lines to meet the needs of the customers he wants to attract. If the merchandise is outdated and the mix is inappropriate new product lines should be considered to augment the existing inventory. New lines can help move older stock if the mix of merchandise is carefully considered. Too great a variety may not be economically feasible; but too little variety or choice is equally dangerous.

Pricing

Consumers frequently complain that prices in downtown BIAs are high in comparison with shopping centres. The chain stores which occupy shopping centres are often able to undercut the small independent businessman. It is important that merchants compare their prices with those of the competition and, if necessary, re-evaluate their profit margin.

If prices can not be altered, BIA merchants should consider offering something extra, such as personalized service or quality merchandise, to justify higher prices.

Store Interiors

The interior appearance of a store and the manner in which merchandise is displayed are extremely important in making a sale and getting the customer to return. Overcrowding and poor displays tend to turn off customers. On the other hand, lighting, colours, and cleanliness are all factors which can create a pleasant shopping environment.

The manner in which merchandise is displayed is also important. Merchandising displays are yet another standardized tool chain stores often use to their advantage. BIA members should develop methods of competing effectively with this, for example, by developing standardized displays of their own.

In-store promotions are also particularly important. Every facet of BIA-sponsored in-store promotions should relate to your overall strategies. Making promotions come to life in your BIA stores requires a review of the following:

Merchandise: Insure that buyer's plans from the merchandise programs are translated into actual allocation of floor and shelf space.

Signage: Prepare the types of signs that are really necessary and make sure they are in high profile locations.

Visual Themes, Colors, and Graphics: Create a visual fantasy that will bring a flavour and sense of celebration to shoppers.

Packaging: Extend themes into the shopper's and gift recipient's home.

Services: Capitalize on consumer's needs for a more efficient shopping time and differentiate your BIA from the competition.

Staffing: Ensure staff are educated to participate in promotional themes and events.

Service

Customer service is one aspect of marketing in which independent merchants can, and often do, outshine their competitors in shopping malls. In fact, this may be one of the BIA's greatest advantages. The BIA merchant can take advantage of the deterioration in service frequently found in modern chain stores by providing personal, friendly service, and by ensuring that staff are available and knowledgeable about the products being sold.

Some BIA's provide regular employee "Customer Service Seminars" to help store owners and employees understand the importance of:

- Providing a pleasant atmosphere
- Attentive and knowledgeable sales staff
- Persuading customers to buy products
- Effectively dealing with complaints and enquiries
- Adopting a courteous and responsive phone manner
- Placing information about promotions/services/special events at Main entrances or in a highly visible location
- Employees "talking-up" BIA promotions or services to customers
- Coordinated store hours
- General acceptance of credit cards/cheques.

Here are some more tips on improving customer services:

- Consider cash/wrap services for special events.
- Concentrate on solving customer problems and complaints.
- Consider organizing a babysitting service for shoppers during promotions. Some BIA's offer free cinema during special events.

Store managers and owners must keep staff motivated. Among the methods they can use are:

- Launch promotions with presentation and party - make it fun and reinforce the message of customer service.
- Give staff "We're here to serve you better downtown" buttons during promotions.
- Communicate regularly with staff to solicit their ideas to improve promotions. Advise them of progress.
- Praise staff for doing a good job.

Collective Marketing Strategy

Marketing your BIA as a unified shopping district promotes a positive image of the area with consumers. This collective marketing approach is one of the most successful features of shopping malls. When you go to a shopping mall, you know exactly what to expect, the kind of merchandise, the mix of stores, the availability of parking, pleasing signage, occasional exhibits or displays, and standard hours.

The BIA is not a shopping mall but a great deal can be learned from the mall's ability to organize a collective marketing strategy. As a result of this approach consumers see the mall as a single entity, even though they shop in individual retail outlets. Consumers tend to think of the mall first, and the outlet second. The same results can be achieved in the BIA, to the benefit of all the merchants and business people, if the collective marketing techniques employed by shopping malls are used.

Marketing techniques are not complex or costly, but they do require cooperative organization. In shopping malls, the responsibility for organizing collective marketing is assumed by the mall manager and most of the standardized approaches are stipulated by the lease agreement. In the BIA, the Board of Management is responsible for organizing merchants into a collective body. For example, Oshawa's BIA has a Retail Council which represents the interests of retailers in the downtown.

Four collective marketing techniques, all of which are used to great advantage by shopping malls should be considered when developing a marketing strategy for your BIA. These four techniques are described as follows:

Standardized Hours

The standardization of store hours is an important advantage of the shopping mall, and one which BIAs often find useful to adopt. Varying hours of operation can result in inconvenience, annoyance and frustration to the consumer and belies the image of the BIA as a one-stop shopping centre. The ill-will created by the inconvenience consumers experience as a result of erratic business hours can easily be avoided by agreeing upon set hours of operation.

If you cannot find a consensus among merchants for sustained coordinated hours, try to set them solely for major promotions and peak periods i.e. Christmas. When you advertise, promote the fact that: "Most stores will be open (9 a.m. to 7 p.m.)."

Coordinated Sales Events

Coordinated sales events are an important marketing tool, but they are dependent on the support and active participation of every BIA merchant. The collective approach to sales events can work effectively only if individual marketing techniques are used. The sales merchandise of each merchant must be appropriate for the seasonal or holiday theme selected for the event and complement that of other merchants. Sidewalk sales, Christmas sales and back-to-school sales all require a strong measure of marketing "know how" that must be channeled into a coordinated effort.

Collective Advertising

The collective advertising of the BIA as a shopping entity in the local newspaper and broadcasting media is an effective method of reaching a large segment of your market and changing the way people think about the BIA. However, it is important to remember that for advertising to be effective, it must be persistent. A "one-shot" effort is of little benefit. It is also important to be consistent and ensure that slogans, graphic displays and a special logo are readily identifiable and associated with the BIA. By smart advertising consumers can be persuaded that shopping in the BIA is an idea worth trying. Because costs can be shared, expensive advertising programs are feasible.

For more information about BIA advertising, see the "Advertising" section in this manual.

Coordinated Window Displays

Coordinated window displays are an extremely effective and inexpensive form of advertising for the BIA. Common themes in window displays can increase the effectiveness of displays substantially and promote a positive image for the area.

For maximum benefit, consider coordinating window displays with newspaper advertising as well. One very popular and successful method of encouraging good quality coordinated window displays and collective merchant participation is to hold regular "Display of the Month" contests.

Prizes need not be elaborate and may consist of a simple plaque donated by the BIA. Major corporations or financial institutions such as banks are also good sources of sponsorship since their image as a benefactor is promoted.

The collective marketing strategy which can be developed using the foregoing techniques will allow you to create a common image, make shopping more convenient, and attract more customers without losing the special individuality which characterizes the BIA.

Appendix I Checklist of BIA Marketing Information

To determine the extent of your marketing information, check off which of the following you have completed for your BIA:

The Geographic Marketplace

- ☐ Trading areas, deliveries, charge accounts
- ☐ Postal codes
- ☐ Downtown vs. suburb

Financial Data

- ☐ The size of the total retail market
- ☐ The size of types of retailing
- ☐ The size of your share of the market

Check
when
completed

LIST OF CHARTS IN THIS SECTION

- ☐ Lifestyle Interests
- ☐ Define the Trading Area
- ☐ Estimate Your Share of Market

LIFESTYLE INTERESTS

Psychographic Profile of General Merchandise Customers in Most Metro Markets

<u>Customer Segment</u>	<u>Shopping Orientation</u>	<u>Store Preference</u>	<u>Demographics and Lifestyle</u>	<u>Growth Potential</u>
Blue Collar, Traditional (14.1%)	Directional, Inflation-impacted Shoppers	Discount Dept., Specialty Lifestyle Mass Mdsers., National Chains	Blue Collar	Low/Mod.
New Conformist (19.4%)	Assured Fashion-involved	Spec. Stores, Dept. Stores	New Conformist Lifestyle	High
White Collar Traditional (21.3%)	Aggressive, Smart Shoppers	Limited Store Loyalty - Shops Departments	Middle-America Lifestyle	Low/Mod.
Retreating Customers (10.7%)	Expedient, Risk-Avoiding Shoppers	National Chains, Dept. Stores	Traditional Lifestyle	Low/Mod.
Creative Customers (19.3%)	Eclectic, Self-Confident Departments	Limited Store Loyalty - Shops	Active Autonomous Lifestyle	High
Transitional Customers (15.2%)	Exploratory, Price-Driven	Discount Stores, Spec. Disc. Stores, National Chains	Upwardly Mobile Lifestyle	High

More than 40% of the customers have no strong **store** loyalty, rather they shop in relation to the strength of a **specific department** ... i.e. full-line stores are shopped as if they were malls, with shopping preference favoring specific "shops" rather than the total store.

Source: Distribution Research Program University of Oklahoma, Professor Bert McCammon

TRADE AREA ANALYSIS

Retail trading areas usually shift a bit during seasons and major promotions, so understanding where shoppers are located is important. Fill in the per cent of your present customers that come from core, primary, secondary and fringe trading areas. Be sure to take into consideration that shoppers travel more often and farther at different times of the year. You may wish to undertake this kind of evaluation regularly to help understand shifts in your trade area.

CORE

5-7 minute walk _____ %

PRIMARY

10-15 min. drive time from store _____ % "

SECONDARY

Under 15-30 minutes drive from store _____ %

FRINGE

Over 1 hour from store _____ %

Don't know? Then do a simple ballot survey. Over a week or so offer a draw prize (\$500, free wardrobe, etc.) to attract ballots, then take a map and pinpoint where entries are located, or check deliveries, credit cards, etc.

THE SIZE OF THE TOTAL RETAIL MARKET

	<u>% of all U.S. Sales' 80 *</u>	<u>% of Your Type of Retailing</u>
1. Food stores	22.7	
2. Auto dealers	17.6	
3. General merchandise stores	12.8	
4. Eating & drinking places	9.0	
5. Gasoline service stations	9.7	
6. Building materials, hardware, garden supply	5.1	
7. Apparel & accessory stores (men, women & children)	4.7	
8. Furniture, home furnishings, ap- pliances, TV, radio	4.6	
9. Drug stores	3.3	
10. All other	<u>10.5</u>	<u> </u>
	100.0%	100.0%

* Source: Sales & Marketing Magazine: Survey of Buying Power, October 1981; Based on U.S. Bureau of Census (1980) data.

SHARE OF RETAIL MARKET

As a simple method of understanding your BIA or store's impact and growth in the trading area, your share of market should be estimated. Although there are many sophisticated methods, a straightforward process is outlined below. (If you wish, adjust your figures for the type of market to which you appeal.)

<u>Share of Market</u>	<u>Example</u>
a) Population in trading area	120,000
b) x average per capita sales	x \$5,000
c) = total retail sales . \$	= \$ 600,000,000
d) x _% type merchandise	x 5.1%
e) = \$ sales in trading area	= \$ 30,600,000
f) your store/BIA total sales	\$ 2,200,000
g) Store/BIA share of commodity - type market e - f	13.9%

Appendix II Determining Marketing Strategy

1. Our BIA will improve its (sales and profit) objective by aggressively focusing on this market segment:

Top Priority	Secondary Priority	New Opportunity
Geographic Location		
Sex		
Age		
Income		
Lifestyle		
Other		

2. The key competitive elements with which we will improve or out-perform similar retailers and competing areas will be:

(Choose no more than three elements; it is impossible to do everything better.)

PRIORITY:

Value
 Sales service
 Support services
 Advertising and promotion
 Visual presentation
 Merchandise assortments, broader or narrow and deep
 Fashion appeal
 Special Christmas effort
 Up-grading of quality prices
 Off-Price promotions
 High traffic locations or "hot spots" in the BIA
 Other

3. Are the three priority elements logically related to one another?
4. The resources we will commit to the top priority strategies are:

Key people:
 Funds:
 Other:

2. Advertising

Introduction

Once you have decided upon your marketing strategy (have identified your market, advertising and promotional strategy, customers, etc) you are ready to consider how you will use marketing various techniques, such as advertising, image, promotion, recruitment, etc, to meet your market's needs.

Advertising is absolutely vital for increasing retail sales and building a reputation. This section provides information on assessing the creative aspects of an advertising campaign, choosing the appropriate media, and assessing the result.

Advertising through the local newspaper and broadcasting media can be very effective if the ads, graphics and wording are well thought out and capable of attracting the attention of the customer.

Assessing Creative Aspects of Advertising

It is almost impossible to predict in advance what type of advertising will be successful. However, the following checklist indicates the aspects of your advertising which should be considered.

Creative Checklist for Advertisements

- () Does it reflect your BIA's marketing, merchandising and position objectives?
- () Do the creative ideas reflect your entire program?
- () Is your advertising truly informative?
- () Does it talk to BIA customers?
- () Are the creative techniques used valid?
- () Do they focus on selling ideas?
- () Does your advertising combine attention-getting ideas with traffic building sell?
- () Does it feature right items, right prices, at the right times?
- () Is it truthful, clear, simple and direct?
- () Does your media plan deliver your target audience in the most cost-efficient way possible?
- () Is your media plan free of tradition and bias - can it be supported by facts?
- () Are you dominant or at least in line with your major competition?
- () Have you considered pre-promotional publicity to accompany your advertising?

What Makes an Effective Advertisement

The following information is taken from Strategic Retail Marketing. How to be a Winner! A Guide to Retail Success, published by the Retail Council of Canada, and written by John C. Williams and John A. Torella.

Use the following as a guide to an effective ad:

Merchandise

Does the ad offer merchandise having wide appeal, special features, price appeal and timeliness?

Headline

Does the headline express the major single idea about the promotion advertised? The headline should usually be an informative statement and not simply a label. For example, "July 16th-19th, 50's Sidewalk Sale. Come down and see the many attractions at the bandshell, between 10 a.m. and 5 p.m."

Information

Does the copy give the basic facts about the goods, or does it leave out information that would be important to the reader? ("The more you tell, the more you sell.")

Layout

Does the arrangement of the art in the ad and the use of white space make the ad easy to read? Does it stimulate the reader to look at all the contents of the ad?

"You" Attitude

Is the ad written and presented from the customer's point of view (with the customer's interests clearly in mind), or from the BIAs?

Believability

To the objective, nonpartisan reader, does the ad ring true or does it perhaps sound exaggerated or somewhat phony?

Call to action

Does the ad stimulate prompt action through devices such as use of a coupon, statement of limited quantities, announcement of a specific time period for the promotion or impending event?

Store Identification

Does the ad use a specially prepared signature that is always associated with the BIA and that identifies it at a glance? Also does it always include the following institutional details: time, dates, hours, location of activities?

Selecting Media

The choice of media for BIA advertising is extremely important. The most imaginative and effective message in the world will be ignored if it appears in the wrong place. You should also resist the urge to select media strictly on the basis of cost; often the more expensive medium is more expensive because it is also more effective.

Media cost comparisons are usually based on the "cost per thousand" of individuals who are exposed to your ad. The method of calculating and comparing costs for newspaper advertising is discussed later in this chapter. The same method can be adapted to other media.

Every medium has its own characteristics, and its own strengths and weakness that make it suitable for certain types of campaigns, and unsuitable for others. The Media Comparison Chart on the following page summarizes those characteristics, and can help you choose the appropriate media for your campaign.

When you have read and understood the chart, complete the media comparison chart for your market area. It will help you to compare each medium in terms of market coverage, type of audience and rates.

CHARACTERISTICS OF DIFFERENT MEDIA

MEDIUM	MARKET COVERAGE	TYPE OF AUDIENCE	PARTICULAR SUITABILITY	MAJOR ADVANTAGE	MAJOR DISADVANTAGE
RADIO	Definable market area surrounding the station's location; coverage area varies by strength of signal.	Selected audiences provided by stations with distinct programming formats.	Business catering to identifiable groups; teens, commuters, housewives.	Market selectivity reach and frequency. Highly flexible to meet changing needs.	No visual presentation of product.
TELEVISION	Definable market area surrounding the station's location. Extended by cable into outlying areas.	Varies with the time of day; tends toward younger age group; less print-oriented.	Sellers of products or service with wide appeal.	Dramatic impact; wide market coverage; audience selectivity by program type.	Relatively high cost of time and production.

MEDIUM	MARKET COVERAGE	TYPE OF AUDIENCE	PARTICULAR SUITABILITY	MAJOR ADVANTAGE	MAJOR DISADVANTAGE
DAILY NEWSPAPER	Single community or entire metro area; zoned editions sometimes available.	General. Tends more toward men, older age group, slightly higher income and education.	All general retailers.	Flexibility ease of ad production.	Non selective audiences.
WEEKLY NEWSPAPER	Single Community usually; mostly non-metro.	General; usually residents of a smaller community.	Retailers who serve a strictly local market.	Targets local audience.	Limited coverage.
SHOPPER TABLOIDS	Most households in a small community; chain shoppers can cover a metro area.	Consumer households.	Neighbourhood retailers and service businesses.	Consumer orientation.	Lack of entertainment or news not always read.

MEDIUM	MARKET COVERAGE	TYPE OF AUDIENCE	PARTICULAR SUITABILITY	MAJOR ADVANTAGE	MAJOR DISADVANTAGE
MAGAZINES	Metro area/regional editions sometimes available; city-oriented magazines available in large metro areas.	Selected audiences by special interest.	Specialty stores.	Delivery of a loyal special interest audience.	Wide coverage area; must be pre-planned months ahead.
DIRECT MAIL	Advertiser-controlled.	Controlled by the advertiser through use of demographic lists.	New and expanding businesses; those using catalogues.	Personalized approach to an audience of good prospects.	High cost per thousand, number of variables that can thwart success of a mailing. Difficulty obtaining prospect customer list.
OUTDOOR	Entire metro area or single neighborhood.	General: especially auto drivers.	Amusements, tourist businesses, brand-name retailers.	Dominant size, frequency of exposure.	Cost, limited exposure, lack of flexibility. Short copy only.

MEDIUM	MARKET COVERAGE	TYPE OF AUDIENCE	PARTICULAR SUITABILITY	MAJOR ADVANTAGE	MAJOR DISADVANTAGE
TRANSIT	Urban or metro community served by transit system; may be limited to a few transit routes.	Transit riders, especially wage earners and shoppers; pedestrians.	Businesses along transit routes, especially those appealing to wage earners.	Repetition and length of exposure.	Limited audience, lack of creative flexibility.

BIA LOCAL MEDIA COMPARISON CHART					
MEDIUM	MARKET COVERAGE	TYPE OF AUDIENCE	COST PER THOUSAND PEOPLE COVERED (Print Media Only)	STRENGTHS	WEAKNESSES
Radio	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
T.V.	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Newspapers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Weekly Newspapers	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Magazines	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Direct Mail	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Outdoor	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transit	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other Possible Retail Media

Shopping Publications

- Merchant-owned
- Independent

Outdoor Signs

- Posters
- Painted bulletins
- Electric signs

Miscellaneous Periodicals

- Local and community publications
- College and school publications
- Directories
- Theatre programs
- National magazines
- Timetables

Transit Cards

- Car cards
- Station posters
- Bus cards

Miscellaneous Signs

- Letters
- Envelopes enclosures:
 - Stuffers
 - Folders
- Circulars
- Postcards and mailing cards
- Self-mailing folders
- Broad-sides
- Booklets and catalogues
- Metered postage messages

Direct Mail

- Taxicab signs
- Truck signs and posters
- Theatre curtains, slides
- Movie shorts
- Street banners
- Skywriting and airplane trailers
- Kites, balloons and blimps
- "Sandwich-man" signs
- Pedestrian benches
- Projections on clouds

Miscellaneous Direct Media

- Dodgers, handbills, circulars
- Reprints of newspaper advertisements
- Package inserts
- Wrapping supplies, merchandise labels
- Gift novelties
- Store publications

The Telephone

Our BIA's media strategy will be:

(e.g. Our media mix will utilize media that can be highly focussed on the target market in a unique manner, yet express our creative stance. Emphasis will be on direct mail, posters in select locations, use of gifts/novelties, parcel stuffers, street banners.)

Cost Comparisons

Advertisers always wonder whether they might be able to make the same impact more cheaply with a different media mix. It is almost impossible to make any realistic cost comparisons from one type of medium to another, because there are no standards for comparison. (How, for example, can you compare a magazine page with a minute of TV time?) However, certain yardsticks are commonly used within media types:

Milline rates (for newspapers)

Cost per page per thousand copies (for magazines)

Cost per commercial minute per thousand audience (for television and radio)

Given the rate and appropriate audience figures, you can usually work out comparisons to fit your own problem. (One advertising agency, concerned with the farm market, compares magazines on the basis of "cost per thousand hogs.") Or you may compare newspapers on the basis of milline rates for the trading area only (true-line). Cost comparisons for newspapers will be discussed in more detail since newspapers are used most frequently by BIAs.

Rate Comparisons for Newspapers

The rates charged per line or per inch are often a poor guide to the actual cost of the space. Common sense should tell any buyer that a newspaper with a large circulation will charge more than a newspaper with a small circulation. Consequently, it is necessary to reduce rates to some sort of common denominator if we are to compare them realistically. The yardstick most frequently used is the milline rate (cost per line of space per million circulation). The following formula is used in calculating the milline rate.

$$\text{Milline rate} = \frac{\text{line rate} \times 1,000,000}{\text{circulation}}$$

Milline rates are useful in making comparisons among various newspapers. For example, here are typical milline rates for the two imaginary daily newspapers.

$$\text{Free Press (morning)} \quad \frac{\$4.47 \times 1,000,000}{607,674} = \$7.36$$

$$\text{News (evening)} \quad \frac{\$4.96 \times 1,000,000}{628,574} = \$7.89$$

After comparing millines, the buyer is in a position to decide whether the higher milline rate is justified.

Run-of-paper colour will, of course, cost more than black and white space of the same size. Most newspapers will not sell colour for advertisements smaller than 1,000 agate lines. Colour surcharges vary a good deal from paper to paper, but they average from 17 percent for a full page to 35 percent for 1,000 lines if black and one colour are used. If full colour (black and three colours) is used, surcharges average from 31 percent for a full page to 65 percent for 1,000 lines. However, in all cases check with your media to find out what they charge.

Co-operative Advertising

Cooperative advertising is one of the more controversial forms of retail advertising. The name "cooperative" comes from the fact that the cost is shared by the BIA and the retailer. (Some prefer to call it "horizontal cooperative advertising" to distinguish it as cooperation by firms that normally compete.)

A second form of co-operative advertising involves incentives paid by manufacturers to encourage retailers to advertise their products. This advertising is controversial because manufacturers in many fields complain about its abuses and ask themselves whether they should use it. Although many retailers favour it, some are quite critical. The media generally favour cooperative advertising.

Exact estimates of how much advertising money is handled on a cooperative basis are hard to come by, but one source estimates it at approximately \$7.5 billion annually.

Co-operative Retail Advertising

When we speak of retailers' use of cooperative advertising, we are talking mainly about large retailers. In many industries, as much as 80 percent of the cooperative advertising dollar of manufacturers is paid to a small group of giant retailers. Often it is not possible for the small retailers to qualify for cooperative money, and as a result the BIA can offer a very scarce incentive to its members to stimulate their participation in its advertising programs.

The main advantage of cooperative advertising to retailers is the chance to do more advertising than they could otherwise do. Money from the BIA helps them do what they know they should do anyway - advertise regularly. Some of them look on it as a gift, and to some, as the cooperative arrangement works, it is. But in every case, it is a welcome addition to the advertising budget.

Media

Newspaper advertising managers are strongly in favour of cooperative advertising, which is a rich source of revenue, and BIA's should cultivate local advertising managers to create and administer cooperative programs for the BIA.

Sometimes BIAs will buy the cover page of a flyer, sometimes they'll buy a banner to reinforce a continuous theme among the flyer pages. At other times the BIA may pay money directly to the media to buy down the cost of member participation. The BIA can, for example, buy down the line rate for advertisers to participate in a Sidewalk Sale flyer.

In all cases, the BIA should try to negotiate a collective contract-rate with local media. Remember that the collective advertising purchasing power of your area is substantial. Use this fact to negotiate better rates for your members.

Monitoring Advertising Results

Every advertising campaign should be monitored, so that mistakes can be avoided in the future, and the effectiveness of your advertising improved. BIA's should ask retailers to keep track of the results of advertising; the following form can be distributed by BIA's to help stores evaluate return on investment.

Advertising Results Form

Department/Store: _____

Classification: _____

Date of Advertisement: _____

of Selling Days: _____

Media:	Size	Costs
--------	------	-------

- Newspaper
- Radio
- T.V.
- Direct Mail

Support Media:

- Windows
- Department Displays
- Signing
- Publicity
- Other

Stock on Hand:

- \$
- # of Units

Stock Sold:

- \$
- # of Units

Gross Margin

%

\$

Advertising Costs to Sales

%

Co-Op.

Net Advertising Cost

Window Displays

An effective method of advertising is the "around-the-clock, 365 days a year" opportunity available through window displays. Advertising through use of window displays, both collectively and at the individual level, is potentially one of the BIA's most important marketing tools.

While the quality and style of window displays help create an image and establish the store's presence, there are many additional advantages that result from effective window displays. A window display is a life size, full colour advertisement. It is the point of purchase and can draw customers inside. If executed with imagination and flair, it can "grab" customers and get them to stop, look and buy. But, like all good advertising, it requires careful planning and execution.

The following eight factors should be considered in planning and executing an effective window display.

1. Consider Your Priorities

- Are you trying to develop a certain image?
- Are you trying to attract new customers?
- Are you introducing a new service or product line?
- Are you highlighting a special promotional event?

2. Draw Up a Display Schedule

It is important to change displays as frequently as possible. This will:

- keep the display timely;
- familiarize customers with available selection;
- assist in good maintenance; and
- continually capture attention.

The benefit of keeping a display timely and interesting is better sales. In one case, an Oshawa storeowner who hired a window display artist found "articles sold so well that the display had to be changed five or six times in the same month".

3. Consider What to Put in the Window

This is where imagination can take over, the type of imaginative thinking that will "grab" the customer. The window should be considered a stage. Think of creating a sense of theatre, incorporating drama, humour, fantasy, romance or controversy. Themes around a seasonal event, promotions or new product lines can be considered.

4. Look at Available Space

Consider the height, width and depth of the window, as well as available space, and position merchandise to work effectively in that space. Allow for some open space and do not overcrowd. Keep merchandise grouped together so that the eye does not wander aimlessly.

5. Consider Props for Your Display

They help to develop the theme and act as the backdrop for the product. They need not be expensive and can be as simple as tree stumps or dried flowers. Try exchanging stock with other merchants and crediting them with a small sign. A children's shop, for example, may use a bicycle from a sporting goods shop.

In using signs as part of a display, make them look professional so as not to detract from the display. Ensure signs do not hide or dominate the display except if special sales are being promoted.

6. Use Colour as a Key Component

It is important to understand how people relate to colour. Information is available from your local library and merchandising magazines. For example, blues have a cooling and soothing effect; deep royal blues suggest sophistication; and royalty and red connote warmth, life and vibrancy. Try experimenting with different combinations and note people's reactions.

7. Lighting Plays an Important Role

Window displays should be lit night and day since they are viewed over a 24 hour period. Inexpensive, unobtrusive track lighting is very effective because of the flexibility provided.

8. Maintenance is Crucial

Poor maintenance and the "dead fly syndrome" can ruin the visual effect of even the most stunning displays. The fresh, "first-day" look can only be retained through regular cleaning.

Coming up with good window displays need not be difficult or expensive. There is a definite art involved, but with some simple "know-how", research and investigation, the art can be acquired. Seminars have proven a very effective means of educating merchants on the art of window displays and can be arranged by the BIA. The merchants themselves can organize and arrange workshops by bringing in visual marketing experts. Window displays are a key tool for effective marketing and provide an opportunity which is available to everyone with a window.

3. Promotion

Introduction

Promotion is another technique BIAs can use to realize its marketing objectives and, like advertising or image, can form a part of its marketing plan.

Promotion of your BIA is one of the most effective means available of achieving economic revitalization. It is important to sell the BIA to the community and the surrounding trade area as a good place to shop, do business, be entertained - a place to enjoy. Promotion can help create a new image for the BIA by changing existing impressions. It can be promoted as a vibrant gathering place where "things happen".

Promotion is a key factor used by shopping centre developments for attracting people. The BIA, however, and main street in particular, provides a far more suitable and attractive ambience than do shopping centres for many types of events. Parades, barbecues, street dances, bicycle races, sidewalk sales, kiosks for artists, outdoor concerts, can all be successfully staged in the BIA and are considerably more appealing if held on main street, for example, than in a shopping centre parking lot. More importantly, the BIA belongs to everyone - shopping centres do not. Promotion of the BIA, by staging interesting historical and community oriented events which highlight the special appeal and unique character of the BIA, convey a special message from BIA merchants to citizens and customers. Promotional activities that are interesting and people oriented tell customers that the merchants "appreciate their business, want them to come to the BIA and have fun, want them to enjoy the BIA and main street".

Some Examples

The types of promotional activities which can be successfully staged in the BIA are endless. Combine enthusiasm and imagination with careful planning and the right ingredients, and you are bound to "have a winner". Examples of the types of promotional events that have been organized by BIA's in communities across the country provide interesting ideas for getting people to the BIA and can be found in "Promotional Ideas for BIA's", later in this manual.

All of these events brought people together, encouraged community support, and promoted the BIA. All gave a sense of life and activity, and worked better downtown than anywhere else.

Types of Promotions

There are three major types of promotions. The three types of promotions include:

- retail sales,
- special events,
- general promotional programs,

and are described as follows.

Retail Sales

Retail sales are specifically geared towards attracting the consumer and the selling of merchandise. They can include sidewalk sales, \$1.49 days, or may be geared towards occasions such as Christmas, back to school time, or Mother's Day. Extra interest can be generated in these sales by turning them into mini special events involving fun activities such as a Valentine-card contest, a Halloween haunted house, or BIA employee "dress-up" days.

Some general pointers which can increase the effectiveness of retail sales include:

- Avoiding clearance "bargain basement" themes which convey a cheap image.
- Promoting "value" of sales merchandise, not its cheapness.
- Adding something unexpected to make the sale memorable. Off-beat promotions can work wonders.
- Recognizing that the actual sale of an item depends on the merchant, whereas "gimmicks" only attract customers, but do not convince them to buy.

Perhaps the most important factor to consider in the use of retail sales for promotion is to get as many merchants participating as possible. Special events in shopping malls are very successful because all outlets participate. The same principle should be applied to the BIA to promote it as a unified one-stop sales centre.

Special Events

Special events can be orchestrated in concert with traditional holidays such as Christmas, Easter and Thanksgiving, or local historic themes. Most communities have traditional events that depict local heritage and can be integrated into a BIA project.

Special Events can attract people to the BIA and increase sales without having to offer cut-rate prices and reduced profit margins.

General Promotional Programs

General promotional programs are intended to project the BIA as an unique area with a distinct identity - an interesting place to shop and visit. Image is the important "catch word". The theme of your promotions can enhance the image you are trying to convey for the area. Tools for general promotional campaigns which identify the BIA as a single entity include slogans and logos, printed shopping bags, T-shirts, balloons, bumper stickers, an awards system for best store windows, a BIA directory and an events calendar. To be successful, general promotion must be an ongoing, year-round effort and BIA's should endeavour to continually improve their promotional programs.

BIA's use special events to attract shoppers to the area (the vertical sell). Once in the area, it is the business owner's responsibility to attract the shopper into the store/place of business (horizontal sell).

In order to provide an attractive and interesting atmosphere in the BIA, Boards of Management are organizing more and more special events.

This chapter deals with how to orchestrate special events to get the most from them. It illustrates some basic principles to follow to ensure successful special event promotions.

Planning a Special Events Program

Following are five steps BIA's can follow to improve their special events programs.

1. Inventory Your Resources

- Prepare a list of relevant contacts from all the groups and organizations in your community which sponsor or could assist in sponsoring events. In particular, groups representing BIA merchants such as the Chamber of Commerce or Board of Trade should be contacted since the involvement, advice, participation, and support of BIA merchants and businesspeople will be required.
- Compile a volunteer registry which includes community groups as well as key, capable individuals. Volunteers are particularly important for hosting special events which tend to be labour intensive. Service clubs often sponsor pancake breakfasts or main street on-the-sidewalk casinos to raise money for charity.
- Boy Scout groups can be enlisted to distribute brochures and put on displays. Senior citizens groups can put on singalongs during special events and distribute hot chocolate during parades. Blood donor clinics often participate with BIA's. The local Salvation Army Band is a familiar sight around many BIA's during the Christmas season.
- Community groups are valuable resources which should be cultivated. Approach them, explain the BIA concept and objectives and look at ways you can work together. But remember, the onus is on you to provide the suggestions. It's quid pro quo. When dealing with these groups you must ensure that they receive benefits from their participation, whether it's fund raising for a good cause, or getting donations for new hospital equipment.
- Working with community groups can take a weight off the BIA's shoulders during promotions and special events. The service club that promotes a pancake breakfast does all (well, most of) the work. You may provide some guidance but they can be counted upon to organize and implement the activity, freeing up the BIA to concentrate its activities elsewhere.
- These events are attractions which draw people to sidewalk sales and other promotions.
- Investigate possible sources of federal and provincial funding. For example, grants provided by the government for Canada Day festivals and provincial programs to subsidize the hiring of summer students (call your Community Planner for more information) for ethnic events and summer promotions have proven to be valuable sources of funding.

- Identify potential activity sites. Examples of potential sites include:
 - main street
 - an outdoor bandstand
 - theatres
 - seniors' centres
 - museums
 - walkways
 - vacant lots
 - town office or courthouse properties
 - vacant buildings (can be rented for a special use such as "Santa's Headquarters").

Most of these examples can be found in every Ontario BIA and each provides an opportunity for accommodating some form of promotional activity. It is important to remember that if suitable sites for particular activities are not available within the BIA, they should be held as close to the BIA as possible so that businesses can benefit from the spin-off effects and the BIA's image will be favorably impacted.

2. Do Your Homework

Consider all the logistics of hosting an event including:

- security
- trash disposal and collection
- parking
- traffic
- utility requirements such as water and electricity
- sanitation
- first aid
- maintenance.

Use this list as a "logistics checklist" in planning each event:

- Identify, contact and obtain the support of key municipal staff members that can assist you with the logistics such as street and traffic workers, the municipal engineer, and the municipal manager/City Clerk.
- Identify the procedures and bylaws which affect permit approvals recognizing that most outdoor events require municipal approval eg. special events permits, road closure permits, etc.
- Check with the local health inspector about rules governing food sales and display. Negotiate an accommodating arrangement.
- Discuss with the fire and police departments plans for site delineation, parking, traffic and crowd control.

3. Ensure Adequate Publicity

- Special events should be publicized to the public at least three weeks prior to the event. BIA members should have six months notice beforehand and at least one month's notice to begin organizing their participation (staff resources, advertising, etc.).
- Some BIA's issue "Sales Kits" to merchants participating in an event. These kits explain exactly what is necessary from the retailer and how they are expected to participate.
- Involve and use the local media. The media is perhaps the most effective means of publicity available and can stimulate enthusiasm and "word of mouth" advertising. Utilize photo opportunities to pre-promote the event. Issue press releases before, during and after the event to explain the promotional concept to the public. Use community calendars in the newspaper, on local radio and TV, to promote the event beforehand. To ensure publicity, some BIA's involve their local media as event co-sponsors. Make the event interesting or "different" and the media will break down your door to get coverage.
- Other techniques that can be used to publicize the event include posters, banners, buttons, bag stuffers, flyers and cable TV public notices.

4. Ingredients for Success

Here are five ingredients that are particularly useful for ensuring success. Experience in Canadian BIAs has proven their value. The five ingredients are:

- music
- food and drink
- overlapping events
- children
- giveaway items

All five conjure up images of fun and activity.

5. Tips for Success

- Start small and emphasize quality over quantity.
- Seek community participation. Politicians and community leaders should be kept informed about, and involved in, community events such as store openings, festivals, parades and commemorative ceremonies. All these events promote the community as well as the BIA. Local provincial and federal representatives can also be invited to certain events to generate additional interest and publicity.

- Try to stage events on a regular monthly, seasonal or annual basis to promote an image of continuity and stability. Make these events something the community can anticipate and look forward to.
- Review and evaluate past events and stay with the proven ones. Experience has shown that it is also best to allow sponsorship to remain with the organizations which have traditionally organized each event but that assistance can be provided and co-sponsorship encouraged between the BIA, service clubs and other business groups, eg. The Chamber of Commerce, schools and colleges, and corporate co-sponsors.
- Remember that the BIA is the best location for community groups to stage events to get maximum exposure. Use this requirement for exposure to your advantage.
- Add something new to retail sales to make them special and, if an idea works and you use it again, build in something new.
- Give ample credit, thanks and praise to volunteers and participants. The importance of this can not be overly emphasized.

Some BIAs throw a wine and cheese party for participants. Others send letters of thanks. Consider presenting gifts or awards to participants/co-sponsors. Publish a thank you in the local papers and in your newsletter.

Thank these people as often as you can, in public. Recognition is a motivator that will encourage participants to get involved again.

A Checklist for Special Events and Retail Sales

Check off each step as your BIA's campaign progresses.

1. Objectives

- ☐ Objective chosen.
- ☐ Target customers defined.
- ☐ Budget set.
- ☐ Theme formalized.

2. Timing

- ☐ Have you reviewed last year's event? Considered improvements?
- ☐ Promotional period set well beforehand. Advise your members of hours, dates.
- ☐ Date when promotional planning must be completed.
- ☐ Tie-in with national or local events possibilities.
- ☐ Conflict with other major local events.

3. Location

- () Facilities for event set.
- () Decoration of facilities.
- () Plans for handling visitors' parking.
- () Local ordinances checked for possible violations.
- () Signage to event.
- () Security.
- () First aid.
- () Maintenance.
- () Trash disposal and collection.
- () Utility requirements eg. water, electricity, washrooms.

4. Timetable

- () Detailed timetable of event prepared.
- () Employees and other participants briefed on timing and their expected participation.
- () Detailed timetable of advertising and publicity prepared and distributed to participants.
- () Special events/speakers, judges, major attractions confirmed.

5. Employees

- () Do clowns know their duties, hours and areas?
- () Sufficient to handle crowds.
- () Trained to answer questions and serve customers.
- () Do they know the theme of the event?
- () Are you adequately insured for the event? (liability, damages)

6. Advertising and Publicity

- () Budget set.
- () Details sent to media to pre-publicize event. (Three weeks prior to the event.)
- () Advertising ready and issued on schedule.
- () Press invitations mailed.
- () Customers and prospects invited to attend by mail, phone and media.
- () In-store promotional materials - handbills, posters, signs and sales personnel - prepared and distributed. Ensure they're displayed in high profile locations.
- () Media coverage arranged for during the event.

7. Facilities

- ☐ Exterior advertising signs and banners placed.
- ☐ Interior point-of-sale material in place.
- ☐ Sales and service areas clean and neat.
- ☐ Merchandise priced.
- ☐ Merchandise tastefully displayed.
- ☐ Literature and selling aids on hand.
- ☐ Gifts or prizes (or both) ready for distribution displayed at least one week in advance.
- ☐ Refreshments ordered and ready.
- ☐ Waste containers ready for cups, plates, etc.
- ☐ Restroom facilities prepared and marked.
- ☐ Registration (prospect) cards or guest book ready.
- ☐ Cleanup detail scheduled.

8. Liaison

- ☐ Key municipal staff involvement:
 - ☐ - Traffic, parking
 - ☐ - Permission/licenses
 - ☐ - Road closures, barricades, crowd control
 - ☐ - Health inspectors aware of the promotion
 - ☐ - Fire and Police
- ☐ Is the community involved:
 - ☐ - Council and politicians

9. Three days before the event

- ☐ Has every participant paid his/her fee (if applicable)?
- ☐ Are posters up?
- ☐ Point of Purchase (P.O.P) material in place.
- ☐ Pre-promotion completed?
- ☐ BIA staff know their responsibilities during the event.
- ☐ All materials needed on hand?
- ☐ Are all suppliers confirmed?

10. Postponement or Cancellation

- ☐ Alternate date selected.
- ☐ Plan developed to notify prospects and customers of new date.
- ☐ Press notified of change of dates.

11. Evaluations

- () Surveys.
- () Committee recommendations for improvements.
- () Media Integration Chart (see Index).
- () Review by block captains.

12. Follow-up

- () Letters thanking participants.
- () Thank you advertisements placed.
- () New prospect lists prepared.
- () Trophy/Award winners publicized.

13. The Second Look

- () Program results analyzed.
- () Advertising, contests, gifts, prizes and sales.
- () Comparison with past performances.

Source: John C. Williams and John A. Torella. Retail Council of Canada:
Strategic Retail Marketing. How to be a Winner! A Guide to Retail Success. 1984.

Developing a Promotional Strategy

In order to get the most out of promotions and the monies spent promoting the BIA, an effective strategy must be developed and maintained.

A strategy to promote the BIA must consider the following basic components:

- Organization
- Unified Efforts
- Convince Merchants to Participate
- Establishing Objectives
- Prepare a Calendar of Events

Organization

It is advantageous for BIAs to create a "Promotions Committee" or "Retail Council" to ensure that BIA members are involved in developing a program of promotions, to give them a voice and a forum in which to present ideas and make suggestions to the Board of Management and help develop and implement the promotional strategy of the BIA.

The roles and responsibilities of this committee are discussed earlier, in Section A.1.

Members for the committee can be selected from interested BIA merchants, members of the media and experts in marketing from within or outside the BIA (such as colleges, schools or large institutions which might be persuaded to take an interest in the BIA).

Members can be solicited through the newsletter, block captains, at the General Meeting, through the media or from personal visits by BIA staff and Board members. Personal contact is by far the most effective way to persuade BIA members to sit on committees. Motivate BIA members with a special skill or a special interest in the project at hand to become involved on your committees.

Once a committee is established to oversee the Board's interest in promoting the BIA, it must endeavour to keep BIA retailers, the Board and committee participants up-to-date on all decisions and plans being made. This can be accomplished by advising BIA members of upcoming meetings through the newsletter and block captains program. Coffee clubs, breakfast meetings and other forums can be used to solicit members and update, inform and solicit feedback from the general membership.

Members who agree to sit on this committee must be committed to participate by attending the meetings, doing groundwork by preparing for meetings, making suggestions and talking about the committee's programs to other BIA members and business neighbours. To ensure a commitment, members of the committee should be told what is expected of them and how they can participate.

Staff members or the committee Chairperson should be prepared to follow-up on the responsibilities assigned to committee members to ensure that delegated tasks are accomplished.

Following is an example Promotional Events Plan. In brief it provides a basic strategy outline of the event for committee members to follow. Subsequent meetings would result in changes to the original plan to improve and adjust it as progress towards the objectives occurs.

Example Promotional Event Plan

Title:	BIA Sidewalk Sale		
Purpose:	To generate retail sales, customer awareness of stores and services and attract new customers downtown.		
Objectives:	To maximize BIA retailer and non-retailer participation. To emphasize customer service, window displays, P.O.P. displays and in-store themes during the sale.		
Date/Duration:	July 15th - 19th 9 a.m. - 9 p.m. Mon.-Fri. 9 a.m. - 5 p.m. Sat.		
Committee:	Chairman Sam Parsons 426-1234		
	Jean Taylor	923-4567	Doug Welles 123-4567
	Abby Fish	789-1011	Fred Patter 121-1415
	Janet Saw	717-1920	Eve Garbut 923-4627
Theme:	50's Sidewalk Sale		

ACTION AREA: RESPONSIBILITY: REPORT TO COMMITTEE BY:

ADVERTISING: Jean Taylor 923-4567 April 20th

Handbills, window banners, flyers to households and as bagstuffers distributed in stores. Co-op 12 page tabloid in the Herald. P.O.P. material on tills. Radio advertising. Special invitations to new residents. Special invitations for stores to give to preferred customers.

Jean will determine costs, options and recommend, using the available budget, how to get the most from our advertising budget.

PERMISSION: Abby Fish 789-1011 June 1st

Abby to meet with Police, Fire and City officials to arrange and secure licences for: sidewalk vending, street closures. To arrange: special garbage pick-up, sanitation, compliance with health dept., maintenance, first aid, access for emergency vehicles.

PARKING: Janet Saw 717-1920 June 1st

To arrange distribution of parking guides, parking tokens by clowns during 3 of the 4 days. To hire clowns. Arrange printing of parking maps. Secure free Saturday parking.

SPECIAL EVENTS: Doug Wells 123-4567 June 1st

1,000 balloons distributed by clowns.

Molson's hot air balloon.

Farmers' market on Wheel Street

Face painting: use art students from local college.

Special exhibits: automotive museum, library.

PARTICIPATION: Fred Patter 121-1415 April 20th

Confirm retail participants, collect fees.

Notification and applications to businesses at least 2 months prior to event.

Maximize non-retailers serving lemonade and hot chocolate/giveaways (balloons, pens, etc.).

Rotary club to provide sidewalk casino.

Keep retailers informed of progress through BIA newsletter.

Kinsmen to provide Wed. morning pancake breakfast.

Aerobics/karate demonstrations.

50's carshow.

Involve colleges (face painting, sidewalk chalking).

Best dressed employee award. Trophy for best themed store interior, best themed window display.

PUBLICITY: Eve Garbutt 923-4627 April 15th

Publicize event, dates, hours as soon as agreed and regularly thereafter in community calendars (cable, newspaper and radio).

Pre-publicity pictures of preparations, face painting.

Press releases before during and after the sale.

Organize press conference for awards, trophies.

Arrange media co-sponsorship of two events.

Arrange "thank yous" in newspapers, newsletter, personal letters to participants and sponsors.

FINANCIAL: Sam Parsons 426-1234 June 25th

Secure budgets, details from all committee members. Receive and document fees. Issue receipts. Arrange donations from corporate sponsors (trophies, giveaways, prizes). Prepare financial statements.

EVALUATION: Sam Parsons

Distribute and collect surveys. Document and file all information. Committee to provide suggestions for next year.

Note to all Committee members:

Please provide a detailed outline of manpower requirements and a budget for your area of responsibility to accompany your report.

If you need money, please detail how much, where it will be spent and when. Thank you.

Unified Efforts

The Promotions Committee must work as a unit. Participants should understand that the majority rules. Individuals will be expected, from time to time, to compromise for the common good.

Regular meetings should be established to assess progress being made towards goals set by the committee and to ensure follow-up to make sure things get done.

How to Convince Merchants to Participate

By drawing more people to the "area", each merchant will benefit.

However, while it is the BIA's responsibility to draw customers to the area, it is the merchants' responsibility to attract consumers from the BIA into their stores. Therefore, the participation of retailers should have a direct effect on the number of people who visit their stores during promotions.

Also, cooperative advertising reduces the costs to merchants, yet allows them a much larger impact for their investment. Each individual merchant has only a few advertising dollars, a small voice and his/her merchandise will appeal to only a small market segment. Joining together with other BIA members therefore produces a significant budget, a large voice and the combined impact of many different stores to attract people to the area.

Group advertising allows the BIA to negotiate large contract reductions in advertising costs. These savings can be passed on to all BIA members - even those who advertise sporadically with a small budget.

For example, the Oshawa BIA Board negotiated a 100,000 line rate with its local media. A regular ad cost 59¢ per line. All BIA members, using the Board's contract rate, were charged only 34¢ per line. Occasionally, to stimulate tabloid publication sales, the BIA would buy-down the advertising rate further, by paying a fee to the local newspaper.

Merchants need to be reminded occasionally that these concepts only work if there is a wide degree of cooperation and enthusiasm. Merchants cannot afford to adopt the attitude of "Well, everyone is advertising to bring people down - why should I?" It must be stressed that everyone should participate for promotions to grow and be successful.

Note: To encourage as many merchants and non-retailers as possible to participate, BIAs should organize events and promotions which are suitable for all BIA members to participate. Beware of organizing "sales" which force merchants to markdown and eliminate merchants who do not wish to reduce the price of their merchandise. Themed "promotions" allow everyone to participate, even non-retailers.

Another way to motivate merchants is to keep them informed of promotion dates and details well in advance of the event. The Guelph BIA publishes a promotional calendar at the beginning of each year which details all the BIA's promotions, in advance, for the year. The Huntsville Town Centre BIA provides advance guidance to its merchants for special events. Continually remind merchants of upcoming events and ensure that they are preparing in advance. Oshawa's internal slogan was "Participate ... and Grow", encouraging merchants to get involved for mutual benefit. For a checklist about the timing and steps to work through a promotion, cross reference under "Advertising", C. 3.2.

Example: "Sale Pack Instruction Guide"

The Huntsville Town Centre BIA issued "Sale Pack Instruction Guides" to participating businesses to maximize their participation during their "Longest Day of the Year Sale".

Each business received, in addition to the Sale Pack Instruction Guide, copies of posters, window banners, customized price tags, radio and newspaper advertising.

The "Longest Day of the Year Sale" guide, issued by the Huntsville BIA, shows how a BIA can guide the participation of its members before and during events.

LONGEST DAY OF THE YEAR SALE

June 21, 1986

Planning Guide

May 26	Order sale merchandise
June 2	Decide on specials
June 4	Radio ads
June 5	Newspaper ads
June 17	Mark price tags Re-arrange displays Give appearance of new merchandise
June 20	PUT UP WINDOW BANNERS BETWEEN 9:00 p.m. and 9:30 p.m. AND PUT ON SALES TAGS

YOU WILL NOT HAVE THE TIME TO DO THIS SATURDAY MORNING!

HUNTSVILLE TOWN CENTRE

LONGEST DAY OF THE YEAR SALE

June 21, 1986

Sale Pack Instruction Guide

1. Make at least some price reductions in each department of your store. Customers should see lots of sale tags as soon as they come into your store so they will get the feeling that everything has been reduced. Don't make huge reductions on too many items or you will lose too much of your margin. Put one-of-a-kind items or items that you really must get rid of as your biggest discounts. Customers will then assume that all of your merchandise is being deep discounted even though most of your stock is just below regular price.
2. Restaurants should use the sale tags to advertise their daily specials and call them your "Longest Day of the Year Specials".
3. Put your door crashers or your deep discounts in the newspaper ad. Don't clutter your ad with too many items.
4. Sales staff is very important for this type of sale, so make sure you have adequate numbers on hand during the off hours so customers don't get discouraged and leave or even worse, leave with the merchandise and not pay for it. Other stores who have tried this early morning date have reported line-ups when they get to their store at 6:00 a.m. Don't be afraid to train one or two part-time students just for these off hours. It doesn't cost much.
5. Re-arrange your stock. Try to create the impression that your store is just bursting with new merchandise. Keep aisles clear and don't build big displays which could cause a security problem. You might consider hiring a security guard or have a relative or a personal friend stand at the door during rush times. If you prevent one shoplifting incident, it is worthwhile.
6. Be sure to put your window banner up Friday night after you close. Also put your sale tags on your specials. **You will not have time to do this Saturday morning.**
7. Window banners will be collected after the sale and stored so we can use them next year. Please handle them carefully.
8. And finally "KEEP THAT CASH REGISTER RINGING".

If you have any questions, feel free to call:

Blair McCann 000-0000

Ron Henry 000-0000

Establish Goals and Objectives

This is an important step which should be taken towards determining and developing a promotional strategy for your BIA. Goals are "where you want to be (or go to)". Objectives show how you intend to get there.

Based on input from all sources - customers, surveys, merchants, other business organizations and other information at hand - you must decide on a series of objectives to reach your goals.

These objectives should be measurable (through customer count, sales volume, evaluation surveys) and realistic. Each objective should be clearly defined in terms of activities necessary, who is responsible for follow-up, budget and timing.

Communicate these objectives to BIA merchants through your newsletters and forums and regularly inform them of progress being made towards these goals.

Note: Don't try to do too much. Accomplish what you can with the resources available, but don't stretch yourself too thin. Each promotion, if organized properly, takes a lot of work and energy. Take a rest between promotions.

Preparing a Calendar of Events

Select which promotional themes and events you will develop over the calendar year. Consider whether they are:

- Seasonal
- Historical
- Special Event
- Ethnic

First, determine those promotions which are run annually in your BIA i.e. Sidewalk Sales, Santa Claus Parades. When you set down your sustaining year-round events, consider the manpower, financial and time requirements of each (use the Process Form for Action Plans, B. 2.5).

Knowing the extent of your commitment towards the year-round promotions will enable you to determine how much money and time you can commit to other types of (ad-hoc) special events promotions.

Be careful at first; some events will work well for you, others won't. Don't "lock-in" the promotion until you are sure of its acceptability. The first and second years always involve a certain amount of trial and error.

Seasonal Promotional Themes

January	-	Winter Clearance Sale
February	-	Groundhog Day Sale
	-	Winter Clearance Sale
March	-	St. Patrick's Day
	-	Easter
	-	Spring Break
April	-	Spring
	-	Easter
May	-	Mother's Day
June	-	Father's Day
	-	Graduation
July	-	Sidewalk Sale
	-	Summer Clearance Sale
August	-	Back to School
	-	Summer Clearance
September	-	Back to School
October	-	Thanksgiving
	-	Halloween
November	-	Pre-Christmas Sales
	-	Welcome Christmas Spirit
December	-	Christmas
		Boxing Day

Get the Most Out of Each Theme

Consider how to optimize the themes you adopt. consider the use of:

- Posters
- Point of purchase materials
- Banners
- Decals
- Dress-up costumes
- Buttons
- Merchants/staff "talking-up" the promotion

Working Within Budget

Rank your calendar of promotions in order of importance and budget accordingly.

Keep track of all expenses and pull in the reins if necessary to ensure you stay within budget.

Get at least three competitive quotations on all art and printing jobs. Sometimes cost estimates can be hundreds or thousands of dollars apart.

When you have committed to production of printed material, only take it to the printer/typesetter in its final form. Avoid costly last minute changes; plan ahead!

Tie-ins and Cross Promotions

If possible, when planning and organizing events, tie-in with other activities already happening in town (check with your City Hall, Chamber of Commerce, local service clubs, newspapers, etc.) This will help increase the profile of your promotion and save you money.

Further, consider cross-promoting products and services between BIA members. For example, your local art store could arrange displays in BIA banks or other service companies. Often large service companies like to host displays and exhibits. Merchants may use props or products from other stores in their window displays, and small cards may recognize and thank the donor, possibly even listing the price of the prop/ product.

Budgeting for Promotions

Budgeting for promotions is a difficult exercise, particularly in the case of first-run events. It is, nevertheless, crucial that a budget be prepared and necessary funds obtained. Even with substantial volunteer assistance and donations, the cost of a running promotional schedule must be considered first, to determine how much additional funding will be required and, second, to explain to donors how funds will be spent.

Examples of budget items which should be considered include the cost of:

Advertising through the media, handbills, posters, flyers, mail, balloons, buttons, decals, bumper stickers

- Sound and lighting equipment
- Facility rental
- Food purchases for volunteers
- Transportation
- Clean-up
- Special gimmicks
- Entertainers fees
- Liability insurance.

Here are a few tips with respect to budgeting:

- Be sure to include donated goods, services and labour on your budget sheet. A meeting room, for example, has a rental equivalent, even if it has been donated for your use. Donated materials and labour show that the community is contributing something. This is an important consideration for obtaining grants since many agencies will match or contribute most of the cost of an event if it can be demonstrated that community donations are being realized.
- Funds may be raised through voluntary business donations (maybe in the form of goods or services), special events grants from various levels of government, special levies (such as the BIA approach), and from service organizations.
- Cost sharing seems to work best in small communities and may be more successful if a greater number of businesses and clubs are approached for less, than if a few are approached for more. This approach may be time consuming but involves more people as participants and evokes community pride as well as pride in the BIA.
- In many BIAs, promotional budgets are used to buy-down the cost for retailers to participate in a cooperative advertising vehicle. This incentive creates more advertising from BIA retailers and more coverage of the event.

- Radio "jingles" are often very effective. If a 60 second "donut" format is adopted, and the BIA buys the first and last ten seconds, retailers can be approached to buy the two remaining twenty-second commercials. In this way retailers receive the impact of a sixty-second jingle for a twenty-second cost.

100 Promotional Ideas For BIAs

NEWSLETTER SURVEYS

Fergus BIA attached an evaluation form to its NEWSLETTER, to get feedback from its merchants on one of its promotions. They also provide feedback to the merchants from customers - comments and suggestions which are constructive and will help to improve the promotion in the future.

Windsor BIA includes, on the back page of its newsletter, a calendar for the month showing different community and BIA special events.

MEDIEVAL "FORESTFEST"

Dundas BIA's "Forestfest" saw merchants garbed in medieval attire, windows painted in a medieval theme, demonstrations by the local Society of Creative Anachronism and strolling minstrels. Other activities to improve the 2-day theme included: Children's films (The Reluctant Dragon, Prince and the Pauper, etc.), a bed race, 4 bands at different locations, Care Bears,

balloons for the kids, an elimination sword tournament, a carnival Sidewalk Sale, face painting, pony rides for children, jugglers, strolling clowns and more.

CHARGE YOUR MEMBERS TO OFFSET YOUR COSTS!

The Gore Park Downtown Promenade BIA made their Downtown Dining Guide self-sustaining by charging each member \$75.00 per listing. They were able to print 20,000 in two colours. The BIA distributed the guides to local hotels, tourist information booths and the Hamilton convention centre.

The Oshawa BIA charged retailers (\$50.00) and non-retailers (\$10.00) to participate in its Annual Sidewalk Sale. These fees covered the cost of providing insurance, posters, bagstuffers, clowns and other attractions. Retailers from outside the BIA, who did not conflict with BIA members paid \$50.00 per day to participate in the four-day Sidewalk Sale.

PAINT THAT UGLY HOARDING

When fences or wooden walls are put around buildings under construction or repair the result can, with a little cooperation, become a pleasant addition to the area. The Oshawa BIA's "Participant-In", co-sponsored with the Robert McLaughlin Gallery, invited artists from the community to paint different sections of the hoarding over a theme: "Oshawa-A Great Place to Live". Response from local artists, school art departments and the local Tourism Association was enthusiastic. After selecting draft drawings submitted by prospective participants, a weekend was set aside during which the artists completed the work. Special precautions ensured that the event proved safe for participants and passing traffic.

A PINK FLAMINGO SIDEWALK SALE?

That's right. Uptown Waterloo BIA promoted a Pink Flamingo Sidewalk Sale. It didn't stop there, however, because there was pink lemonade, pink candy floss and even a Pink Panther movie. If your name happened to be PINK or FLAMINGO, you received a free plastic PINK FLAMINGO.

BRANTFORD "SHOPPING SPREE"

The Brantford BIA offered \$2,300 in City Centre \$25.00 merchandise certificates to be won. Most merchants offered special ballots to their customers to fill out. Each ballot was validated by the distributing merchant. The customer then had the ballot validated at two other City Centre businesses and then deposited the ballot at any one of six central locations (mostly banks).

HALLOWEEN DRESS UP

The Oshawa BIA offered prizes for best costume to employees and the best window display during their Halloween promotion. Each year in excess of two hundred employees dress the part and enjoy the fun of Halloween in Downtown Oshawa. Restaurants offered special Halloween dishes. It's fun for the staff and fun for the customers.

GIVEAWAY MONEY VOUCHERS

The Ottawa Street BIA produced money vouchers, each worth \$20.00, which were distributed by a "Mad Hatter" during their 12-hour "Mad Hatter Money Madness Sale". The BIA advertised that the "Mad Hatter" (dressed in full costume, of course,) would give away \$100.00 per hour. The "Hatter" chose 5 people an hour and awarded them with vouchers redeemable in BIA stores. The vouchers, once redeemed by customers, were purchased back by the BIA at face value.

BIA SHOPPING BAGS

During Oshawa's Sidewalk Sale, merchants decided to purchase low cost shopping bags from the BIA to provide to customers during the sale. Merchants felt that regular bags were quite expensive and they preferred not to use them for drastically reduced sale merchandise. The BIA had a "plate" made up and negotiated a volume discount with a bag manufacturer. The bags exhibited the BIA logo and sale theme. Merchants bought the bags directly from the BIA and purchased approximately 50,000 over a three-year period.

LONGEST DAY OF THE YEAR SALE

For their "Longest Day of the Year Sale", the Huntsville Town Centre went outside the BIA and involved the entire town. The organizers divided the merchants into three categories based on volume of sales and type of merchandise. A breakfast meeting was held to explain the sale concept and motivate participants. The top category paid \$150.00 for a "Sale Pack" which included window banners, price tags, radio advertising spots and a small newspaper ad. The second and third categories paid \$75.00 and \$20.00 and received two smaller versions of the first package (fewer banners, smaller ads and fewer price tags).

RUN FOR CHARITY

Many organizations are hosting 5km and 10km runs for various charitable causes. This is an excellent opportunity for the BIA to show community leadership and involve non-retailers in the planning and marshalling of the event.

FIRE!

The Ministry of Revenue in downtown Oshawa hosted a pictorial record of the many downtown fires, some from over 100 years ago.

EASTER EGG HUNT

Special eggs containing gift vouchers are hidden around the BIA. Customers are invited to bring their children and search out the hidden prizes.

EASTER BONNET CONTEST

One BIA held a special contest to see who could create the best Easter bonnet. Over fifty entries were judged and the ladies made a colorful addition to the downtown on the day of the event. Press coverage was excellent.

BEST "DRESSED" WINDOW CONTEST

What better way to get into a theme than to encourage merchant participation by decorating BIA windows. Another opportunity for positive media coverage.

FARMERS' MARKET

Invite farmers to vend their wares on-the-street during your sidewalk sales. Usually this won't conflict with existing merchants and it adds colour and interest to a sale. Permits may be required.

PHOTOGRAPHY DISPLAYS

One BIA is hosting a major display of photographic art - IN RETAILERS WINDOWS. Invite local artists to display their works in your BIA windows.

PUMPKIN CARVING CONTEST

A contest is held and pumpkins are displayed in BIA members' windows. Ribbons for the winners are also included after judging is completed.

CAR SHOW

Close a street and invite local car enthusiasts to show their vehicles! You'd be surprised how many beautiful old cars are uncovered and displayed.

50's FASHION SHOW

Rent a portable stage and put on lunch-time fashions shows. Possibly feature a different BIA retailer each day. This would make a worthwhile Monday lunch-time event to stimulate traffic.

PANCAKE BREAKFAST

Involve your local service clubs to organize and put on such an event. They often are an excellent addition to a sidewalk sale and serve as a crowd pleaser, usually at no-cost to the BIA.

PAINTED FIRE HYDRANTS

Local schools adopt-a-hydrant, which they paint up along a certain theme e.g. Christmas characters. Hydrants can be left or painted their original colors once the promotion is finished.

CLEAN-UP DAY

In order to spruce up the BIA after winter, designate a special clean-up day and encourage merchants to take a higher profile on the street by cleaning windows and sidewalks, replacing cracked brick and re-painting!

HALLOWEEN HOOLEY

Have merchants decorate their windows in the Halloween theme, with pumpkins and spooks. BIA employees can participate in a Halloween dress-up contest sponsored by the BIA.

DOWNTOWN OPEN HOUSE

Invite the community to visit the BIA! Encourage the merchants to be especially friendly and to take this opportunity to meet new customers. A walking tour of the downtown may provide an interesting tie-in.

CHRISTMAS TREE LIGHTING CEREMONY

The BIA can place a large Christmas tree in a central and highly visible location and hold a special "unveiling" for the general public, complete with carollers, hot chocolate and Santa Claus.

DOWNTOWN COLOURING BOOKS

Some BIAs provide colouring books for children, showing the different places of interest in the BIA.

STREET DANCE

Close off a secondary street and host an old fashioned street dance! Set a theme, arrange special lighting, tables and chairs and you're away. Outdoor B.B.Q.'s add to the festivity and a local dance band can provide some foot stompin' music. Security and garbage arrangements are important.

STARVING ARTIST SALE

Encourage local artists to display their wares in a park or on a sidestreet in the BIA.

OUTDOOR BINGO/CASINO

Have a local service club sponsor a bingo or casino during your promotions. Often non-profit groups can, by providing these types of attractions, raise money for a good cause while entertaining people in the BIA.

UGLIEST NECKTIE CONTEST

That's right, The uglies win too! Get the public to bring their ties to the BIA for judging. Categories can include: most horrible design, worst colors, overall ugliest etc.

WHAT I LIKE ABOUT DOWNTOWN IS...

Sponsor a poster contest among local schools where kids enter posters they've designed to show what they like about the BIA. All posters can be displayed in BIA store windows.

BIA ANNIVERSARY

Rather than all the BIA merchants celebrating their store anniversaries on different days of the year, hold a special week where all the businesses can celebrate together. This theme could be reinforced with posters and banners in all business windows.

CAN YOU HELP ME?

Some BIAs sponsor special seminars for downtown employees, emphasizing the benefits of customer relations.

BIA MAPS

Provide maps which show tourists, shoppers and other visitors what is in the BIA and how to find it. Maps can be used as promotional giveaways, or put in newspapers and flyers.

NICE MERCHANT AWARD

If friendliness among BIA businesses is one of your main features, then highlight this aspect of your BIA by hosting a special event in their favour.

TREASURE HUNT

Shoppers will be interested to search the BIA for clues to find elusive treasure. Along the trail they will find many interesting stores and places to eat at.

CHILDREN ONLY MOTHERS DAY SPREE

Here's an idea, BIA stores set aside a special morning for children to shop to find gifts for Mothers day, at pint-size prices, of course!

UNFIT WALKING CONTEST

For those who are not in top shape, how about a 1.5km Unfit Walking Contest. It's easy and potentially lots of fun.

KITE FLYING CONTEST

If the topography is suitable, try to get local kite flyers out for a day's fun in the wind.

ST. CATHARINES BED RACE

The Downtown St. Catharines "Bed Race" is a major promotion held annually on a Thursday night in August for the past 7 years. The main street of downtown, St. Paul Street, is closed from 6 p.m. to 8 p.m. Then all cars are cleared away from the parking meters so the 1020 foot course can be readied for the parade of beds at 6:30 p.m. The homemade racing beds are designed with the utmost creativity and prizes are awarded for the fastest bed, the most novel bed and the zaniest costumes. The team consists of 5 sportsminded competitors, four of who push, and one who remains in the bed. Over 20 teams enter and a crowd of up to 5,000 people line the street to cheer on their favorites. The spectators can win a special prize by entering a trifector competition.

Prizes are donated by local businesses, wineries and a major brewery. After the race, a pajama party is held for the participants and spectators at a local bar where music, more prizes and a lot of fun round off the evening's activities. The event receives wide coverage from all media and has brought together a wide range of community interest. Everyone looks forward to the event each year.

WINDSOR'S FASHION FANTASY AUCTION

In Downtown Windsor, THE "FASHION FANTASY AUCTION", hosted in a vacant department store, saw almost 800 people bid on clothing donated from BIA stores. The vacant Steinberg building was transformed, using plants, balloons and room dividers, into a fantasy land, complete with professional sound and video displays. All proceeds went to the local Canadian Mental Health Association.

HENSALL'S "YARD SALE PLUS"

The Hensall BIA, in conjunction with the Village of Hensall, presented the "Second Annual Community Yard Sale and Merchants Sidewalk Sale" earlier this year. The BIA Manager solicited commercial contributions towards the advertising, as well as having those people who wished to have their yard sales identified on a map pay \$15.00. The end result was a placemat-type flyer showing the location of yard sales, the downtown area and a designated childrens' area at the local playground, where supervision was available.

The population of Hensall swelled on that day, as bargain hunters swarmed through the Village. Hensall BIA Chairman Dave Hewitson mentions that this event can be organized fairly easily to accommodate a community of up to 5-6,000 people, and the citizens of Hensall are eagerly awaiting next year's sale!

CABBAGE PATCH DOLL PARADE

The Forest Town Centre BIA organized a Cabbage Patch Doll parade which attracted over 100 children (and, of course, many parents) and received wide media exposure, including a major TV station.

POSTERS AND FLYERS

The Trenton BIA advocate using posters and flyers, produced by the BIA, to reduce costs and promote consistency. For their Annual Sidewalk Sale, a poster was produced to promote the event. The front page of the flyer was a reproduction of the poster.

STRAWBERRY FEST

"Strawberry Fest '86" marked the grand re-opening of the newly renovated Farmers' Market in downtown St. Catharines. Many different activities occurred throughout the day. Activities like trick riding, bands playing, choral groups, guest appearances by Polk-A-Roo, the St. Catharines Blue Jays "Cabbage Head", and a strawberry social. The Downtown Association had a booth at the market where coupon booklets, information about the Association, parking tokens and strawberry lemonade were given out to passers-by. The merchants downtown had a special one-day sale for the occasion.

The re-opening was orchestrated by the Market Operating Committee, City Hall and the St. Catharines Downtown Association. The renovations to the Farmers' Market have encouraged surrounding businesses to renovate as well. The plan is to have the Farmers' Market become a major focal point downtown, and to have an annual Strawberry Fest to celebrate the first day of summer.

USING THEMES

Theme your promotions. Using "Sales" and cut-pricing to attract customers downtown is not conducive to all BIA businesses. Downtown Windsor Days were themes to celebrate the season. Celebration of Spring and celebration of Autumn themes include strolling musicians, mimes, fashion walks and free flowers for downtown shoppers.

DISPLAY CONTESTS

The St. Catharines Downtown Association sponsors three different window and interior display contests during the year. The first contest coincides with the annual Folk Arts Festival. The retailers can enter a window or interior display that features store merchandise and depicts a multicultural theme, or an ethnic display of clothing or artifacts from a particular country, or they may enter a costume display. The second contest is held during the annual Niagara Grape and Wine Festival. This particular contest always has a high participation rate. Many banks and restaurants get involved in the costume/interior display aspects. The final contest is for Christmas. All of the displays for each contest are judged by members of the community for ingenuity, attractiveness and effective use of merchandise with the theme. Trophies, ribbons and wine are awarded to the top three in the exterior category and the interior category. The winners' names are also published in the newspaper.

THE PELISSIER STREET GRAND OPENING

The Pelissier Street Grand Opening, held in downtown Windsor, promoted recent streetscape improvements to the general public. The "All that Jazz" theme of the grand opening was reinforced by marching bands, stationary and strolling musicians. The BIA received permission from the City of Windsor to close Pelissier Street and offer free parking in the Parking Garage from 12:00 p.m. to 6:00 p.m.

Participating merchants had the option of providing a volunteer doorman (or woman) for the day. Black tuxedos, red bow ties and cummerbunds were the order of the day as the doormen/women handed out carnations to shoppers and balloons to the children. Preferred customers received general invitations to the event, who, upon presentation of the invitation, received a complimentary buffet dinner donated by Pelissier Street merchants.

SERVICE CLUB TIE-INS

Often, local service clubs can be counted on to help the BIA provide attractions to encourage customers to come to the core and enhance special promotions. Some provide pancake breakfasts, while others such as the Oshawa Rotary Club put on a sidewalk casino (for charity) during the Oshawa BIA's Sidewalk Sale. The Forest Kiwanis organize a parade which kicks off the Christmas spirit in the Forest BIA.

WELLAND'S MARDI GRAS

To tie-in with the festive spirit of the Rose Festival Sidewalk Sale, the Welland Downtown Development Board sponsored a people's walking parade and Mardi Gras.

The Welland Hospital Auxiliary provided strawberry shortcake and entertainment with the proceeds going to help buy new equipment for the hospital.

Invitations were sent out to local personalities including the Mayor, Council, Regional Council and the M.P. and M.P.P. for the area. School boards were contacted and posters and in-school announcements helped to solicit participants. Local businesses donated material to the schools for costumes and the traditional Mardi Gras dragon, and local groups such as the Big Brothers and Big Sisters organizations participated.

Publicity in local media included feature articles, news segments and advertisements. A thousand flyers were distributed and posters hung in prominent bank, store, mall and library windows.

Forty-five prizes were awarded for costume categories. These prizes were personally solicited from downtown merchants.

Judges (who developed a criteria for awards), the Mardi Gras Parade Marshal and volunteers helped on the day. The C.H.O.W. (radio) van was on hand to help promote with live cut-ins.

The parade took place on the sidewalk, creating fewer problems than would the closure of a street. Total expenses amounted to about \$1,500.00

OSHAWA'S SIDEWALK SALE

During its Annual Sidewalk Sale, the Oshawa BIA encourages its non-retailers to participate. Service business staff dress-up along the theme of the sale (200 employees participated in its last costume contest). Banks give out free drinks and coffee during the sale. Other service businesses give away pens, pencils, balloons, have staff do face-painting, distribute brochures and put on sidewalk mini-seminars and demonstrations on aerobics, tax tips, financial advice, etc.

SHORT AND SWEET IDEAS

During high-profile promotions, fast food outlets can usually be counted upon to provide drink dispensers (McDonalds) or giveaway coupons (Burger King).

Oshawa hired a student each year to walk through all buildings, up and down stairs, to obtain info for mailing list.

Guelph: Calendar of events to all BIA members. Features all committees, (names, phone nos.) committee meetings, The Year in Review. All major promo events dated in advance. Notice of all Board meetings. Notice of Downtown Forum's Annual General Meeting.

Guelph sends out a promotional package to accompany each campaign.

The Guelph Mercury were so pleased with the BIA's Sidewalk Sale flyer that they gave the BIA the front page FREE.

The Guelph BIA's goal is to be in the paper twice per week. The Manager holds meetings with the press the same day, every week.

Guelph has an Chamber of Commerce member as an ex officio member on the Guelph BIA Board. Also a City staff member sits on their Board.

BURLINGTONS BROCHURE

To attract potential investors to look at the Burlington BIA and to give them the facts they need, the BIA produced an attractive brochure designed to tell potential investors about the character, economy and investment climate in downtown Burlington.

KINGSTONS "A DAY IN THE LIFE"

The Kingston BIA organized an exciting event which saw hundreds of photographers chronicle the life and flavour of that city.

A GOOD LOGO IS IMPORTANT!

Some BIAs are guilty of using second rate artwork or amateur graphics and logo's in an effort to keep costs down. This is false economy. The BIA must look sharp in all its posters, ads and print work. Use good talent. Pay for it when necessary.

HAVE BIA ADVERTISERS USE THE BIA LOGO

Imagine the impact if all BIA businesses used the logo in their advertising. This virtually cost-free idea, if promoted regularly and consistently, can result in tremendous advertising for the BIA.

TIE-IN PROMOTIONS

Always promote the fact that your BIA is the best location to host community events. Whether it's a parade or local hockey stars signing autographs, encourage people to hold the event in the BIA!

ELIMINATE EYESORES

Most BIAs have a certain amount of clutter: posters, signboards and old signs are culprits. Most of these petty eyesores could be thrown away. Take a walking tour with your BIA Board and make a list, then contact the appropriate people and ask for their help to remove the offensive objects.

ICE MELTING CHEMICAL

The Oshawa BIA reacted to many complaints from seniors who had difficulty with ice buildup on downtown streets in the winter by buying a special ice-melting chemical in bulk from a large supplier and then selling the chemical back to retailers at cost. Store owners helped to keep their sidewalks ice-free during the winter months and the BIA received many letters and positive publicity from seniors groups. The idea cost the BIA little but had substantial returns.

THOSE WHO WORK DOWNTOWN - BUY DOWNTOWN!

Many BIAs are now looking for ways to capitalize on their prime market by improving service during lunch-hours or offering special incentives to BIA employees. These are steps taken to convert BIA workers into better BIA spenders.

NEWSLETTER WHOSE WHO

Be sure to include important local and provincial representatives on your BIA mailing list to receive newsletters, reports, surveys, etc. Get your BIA's message across.

WALKING TOURS

Some BIAs organize walking tour pamphlets with maps and a description of the major points of interest in the BIA. With a little research many BIAs can develop an interesting walking tour.

CONCERTS IN THE PARK

If you have an interesting park, bandshell or place in which to hold special events, consider a series of outdoor concerts or a hot-dog festival in the park.

PARKING GUIDES

Many BIAs publish parking guides which detail available parking in the area, meter rates and hours of operation, etc. Oshawa sold advertisements on the back cover to BIA members, which covered the cost of printing. In addition, a space was left which said: "This guide courtesy of" allowing stores a space to put their store stamp. Guides were distributed to all major banks and retailers.

BUS GRAPHICS

Recently BIAs have begun to paint attractive graphics on buses. In some cases the message on the rear of the bus says: "follow me downtown!"

BIA TV SHOWS

Some BIAs have produced short TV shows to promote special events or simply to keep local viewers informed about happenings in the BIA.

WELCOME WAGON

Some BIAs tie-in to the local welcome wagon to help introduce new people coming into the community. A directory of businesses and services in the BIA could be very useful to someone new in town. Parking guides would be appreciated as part of an introductory package.

RESTORATION CAN BE A GREAT THEME

Restoration emphasizes the area. When reconstruction takes place within the BIA, promote the event to shoppers. This will help to strengthen the BIA's image while involving the community in what's happening. If they understand that some short-term inconvenience will result in a more pleasant place to shop in the future, they will see the construction in a different light.

BOX-LUNCH SEMINARS

Some BIAs provide noon-hour seminars for downtown shoppers, featuring experts to talk about various subjects of interest.

RACING CAR SHOW

A great event (if not race) to attract people into the core. In addition to racing cars, the local community can be asked to enter off-road vehicles, vintage cars, street rods, exotic cars and vans, custom made cars and more.

4. Tourism

Introduction

Tourism can contribute substantially to the viability of the BIA and the community as a whole. Specific benefits of tourism include:

- Job creation
- An additional economic base for stores, restaurants, hotels, motels, gas stations and other related businesses
- Promotion of qualities unique to the community, making these evident to local residents
- Support for local arts and cultural activities
- Generation of community pride.

For most communities, tourism is an elusive trade. A successful strategy requires the co-operation of municipal council, retail merchants, community leaders and the local food, service and accommodation sectors. More importantly, it requires an attraction.

Many successful attractions deal with heritage - museums, historic sites, monuments, architecturally interesting buildings. Other local resources which may serve as tourist attractions include:

- Cultural assets such as fairs, festivals, exhibitions and ethnic traditions
- Environmental resources
- Recreational and sporting activities
- Shopping areas.

Two factors are important to remember when pursuing the tourist dollar. First, many tourists are not interested in cheap "claptrap" or "gimmicky" themes. They are after quality. And second, once the tourist is attracted, the community must be able to meet his needs, thereby capitalizing on his spending capability. If there are no interesting restaurants, or shops that sell books or pamphlets on the local area and its history, or nice places to spend the night, then the tourist will not stay and will not recommend the area to others.

The development of a community tourism strategy will usually require a separate and distinct organization. However, the BIA stands much to gain if tourism can be successfully promoted, and can help instigate and support the tourist trade.

Tourism Development

The manner in which tourism is approached will vary substantially for every community. Seven points have been identified by marketing experts which can guide your BIA in developing tourism.

1. Get Community Leaders Involved

An organization is required to promote tourist activity. This organization must include both elected and non-elected community leaders to demonstrate to the community that tourism is an important activity.

2. Start a Community Education Program

The community needs to be educated to the benefits of tourism. Answers to the question, "what's in it for me?" must be provided. The media can assist in this educational process.

3. Assess Potential

Be optimistic, but realistic. Highway routes, weather, proximity to major centres and other tourist attractions, and aesthetic and interesting physical features must be considered.

4. Develop a Plan

The plan should indicate

- How many tourists can be attracted?
- How can we capitalize on existing features in our area?
- What are we going to tell them?
- How much do we invest to attract the tourists?

The Ontario Ministry of Tourism and Recreation can help you in developing such a plan.

5. Execute the Plan

Tourists will not be attracted to just planning and wishful thinking. Once a plan is developed, the work must commence.

6. Evaluate and Manage

A plan has to be evaluated and checked to make sure progress is being made. If changes are required, then these changes should be made as conscious decisions, not as accidents or ad hoc, sporadic policies.

7. Enjoy

Tourism, if properly planned for and handled, can bring as much enjoyment to the hosts as to the visitors.

5. Recruiting New Businesses

Introduction

Recruiting new businesses to locate in the business district is an important part of marketing the BIA. Shopping malls, which are the major competitors of BIAs, routinely hire a mall manager to search for prospective tenants who will improve the mall's retail mix. BIAs must be prepared to invest the time and money required to attract new businesses, in order to increase the variety of places to shop, and the variety of goods and services offered.

Recruiting new businesses also helps solve the problem of vacant shops in the BIA, which damages the business district's image with potential shoppers.

Brad Brownlee, Sarnia BIA, suggests the following strategy:

Recruitment Techniques

There are a number of general techniques that can be used to recruit new businesses, including:

- advertising for new businesses;
- advising potential businesses of the specific requirements -for example, "we've done a survey which shows this area needs a shoe store";
- recruiting successful merchants in neighboring communities to open branches in your BIA;
- providing special incentives like lower rents.

However the most effective means of recruitment is direct solicitation of prospective businesses. New tenants are brought into the community; they almost never arrive without assistance. This in turn requires the BIA to understand what its area needs, which businesses to approach, and how to approach them. The group assigned the task of developing and implementing a recruitment strategy should include representatives of the municipality.

Based on material developed by Heritage Canada and the National Trust for Historic Preservation, there are five basic steps that have proven useful in recruiting new businesses.

1. Understand Your Market

Some of the data needed to understand your market may be available from your evaluation exercises. The data required should include both a demographic inventory which identifies:

- population of trade area,
- number and size of households,
- per capita and household incomes,
- population by age group,
- gaps identified and perceived by the consumer in downtown,

and an inventory of existing businesses in the BIA and the competition.

This data will enable you not only to identify what sort of retail mix the BIA now has and could potentially support, but is information prospective businesses will demand.

The demographic data can be obtained from agencies such as Statistics Canada and should be tailored to suit the needs of each particular business you are trying to recruit. For example, if you want to recruit a children's store, be sure that the proportion of the population aged 15 years or less is further broken down into infants, preschool, ages six to twelve and teens.

2. Inventory Available BIA Buildings

Consider the type of space available for prospective businesses and prepare a profile of each building which includes:

- Date and type of construction
- Size
- Amenities
- Facilities/utilities
- Land use district classification
- Occupancy
- Available space
- Rent
- Taxes
- Selling price
- Leasing conditions
- Contact persons.

Some of this information may be available from your evaluation material collected earlier in the process. Remember, however, that the profiles are specific to a particular building and must be kept current.

3. Identify a Preferred Retail Mix

A retail mix should be primarily based upon what your market demands and can support. Build from the existing retail mix. Your profile of available commercial space can assist you in identifying a preferred mix. Consider how this space can be used to help improve retail choice. Set reasonable objectives. Do not expect an Eaton's or a Bowrings to locate in your community if your trade area population is 10,000 persons or less.

4. Prepare a Marketing Brochure

Three rules should be followed in preparing market brochures:

- **Keep it simple.** Include only salient facts about your community, such as location, population, transportation access, major amenities, and about the market including trade area population, number of households, income levels and age structure. State that more detailed information can be made available to interested businesses.
- **Keep it flexible.** Do not print anything in the brochure which is likely to change in six months. A brochure designed with pockets that can be filled with up-to-date information is a good idea.
- **Make it useful.** Include information designed to attract specific businesses the BIA needs in order to provide a desirable retail mix.

5. Target New Businesses

Now that you have identified what businesses the BIA needs, canvass your community and trade area for successful businesses that may be interested in expanding, diversifying or relocating. Start in your own backyard. Your BIA may be your best source for potential new retailers. Approach the competition. They may be interested in participating in your BIA's revitalization. Try businesses located in other communities within a 100 or even 200 kilometre radius. Remember to approach the small independent retailer as well as larger national chains. It is the independent retailer that is the heart of the BIA. Convince businesses you have an opportunity - a market they can tap. Recognize the investor's locational point of view in your approach. Remember that an investor considers two factors. First, a good community must be selected, one which is characterized by economic growth, overall stability, a good trading area, not too much competition, and political cooperation.

Second, a good site must be selected. A good site is characterized by appropriate traffic flow and accessibility, location of both competing and supporting stores and quality of local building codes and by-laws.

Attracting New Development

All of these techniques deal with recruiting new businesses to occupy existing space. However, many opportunities exist for attracting new development to the business district.

Attracting new development is largely the responsibility of the municipality, although the BIA can assist in this process. It requires an understanding of the development process, a knowledge of the kinds of development best suited for the business district, and the use of incentives, usually in the form of financing assistance or land use concessions. All of these require the active participation of the municipality.

The development process is fairly complex, but it can be summarized by the following questions.

1. What Does the Developer Look For?

- Market potential
- Available land
- Evidence of an organized community
- Available financing

2. What Are the Developer's Concerns?

- Is the project feasible?
- What are the risk factors, the uncertainties, the constraints?
- Who is for or against the project?
- What are the benefits - the projected revenues and after tax returns?
- What are the pressure points - can they be overcome?

3. What are the Common Issues in BIA Development?

- Parking - how much is required and who pays for it?
- Regulatory environment - land use district, building codes, design review process.
- Public amenities and improvements - who pays for them?
- Required guarantees and commitments.

Municipal administrative staff, the Chamber of Commerce, bank and finance company managers and your planner can all assist you in understanding the process of development. Make use of their expertise.

6. Physical Improvements

Introduction

There are many ways of approaching the problems of the physical revitalization of shopping areas. The most successful examples have tackled physical revitalization with sensitivity, and have capitalized upon existing resources -- those special and unique features of downtown that provide a sense of history, community and tradition -- a sense of "place". Such resources are found in most BIAs and while they may vary, usually provide opportunities for creating a physical image that can change the perception of the BIA as being tired or outdated, and can help to boost community pride and establish the confidence of merchants and shoppers alike.

It is essential that any new development, be it a mall or an individual building, complement the BIA by being the right size and featuring the right mixture of outlets. For most small communities, a downtown mall is neither economically feasible nor desirable: it could cause serious competition to existing downtown business unless it can become an integral part of the downtown. In some smaller communities where malls have been developed on the periphery of downtown, the effect has been to shift the focus of development away from mainstreet.

Heritage Canada have undertaken extensive research, development and evaluation of physical improvement initiatives. The following selection of material is based largely on their Main Street Programme.

Approaches

There are many approaches to physical improvement. All have both advantages and disadvantages, as discussed below.

1. Beautification to Public Streets and Property

There are many ways BIAs can improve municipally-owned property: better pedestrian level lighting, benches, planters, parking lot buffer zones, garbage receptacles and seating areas are just a few of the many options available.

Improving the environment in the BIA as a place to work, live, eat and shop is very important. However these types of improvements do not always improve the economic environment. Special care must be taken to maintain improvements to ensure their continued value.

2. Facade Improvements

Section 28 of the Planning Act provides the legal basis for the establishment of a municipal facade improvement program. A commercial facade performs various social, visual and spatial functions while simultaneously working with the common physical characteristics of the community and adjacent buildings.

The Sarnia, Hamilton, the Brantford BIA, Kitchener, London and the City of Brockville are actively promoting facade improvement programs in their downtown areas.

3. Preservation and Restoration

Rather than demolishing and rebuilding, the approach taken by many BIAs involves using the existing building fabric and restoring the building to its former attractiveness. A number of grants are available for Heritage buildings and various publications illustrate how the restoration process can be cost effective. See the bibliography at the end of this section for more information.

4. Development of Themes

The development of "theme villages" has occurred in Ontario. The purpose of adopting a "theme" to be used throughout the area is to provide a uniform image and help attract people to the area.

5. New Development and Re-development

Many BIAs are encouraging new investment and re-investment in downtown properties. By "filling the gaps" BIAs help to strengthen the mix and variety of business and services available to the public. In addition, BIAs are encouraging investors to look at opportunities which exist and can be created in the BIA.

The successful examples of physical revitalization -- those that attract new businesses and improve existing ones -- build upon existing resources, and include sensitive infill. All the relevant elements and necessary ingredients should be considered, including building facades, maintenance, beautification, public improvements, signage and parking consideration, as well as pedestrian and traffic flows.

The issue of parking and the relationship between pedestrian and traffic movements is very much a local issue that is community specific. Your planner, architect and/or traffic engineer will be able to develop a comprehensive circulation system that suits the needs and objectives of your BIA.

A total package for BIA physical revitalization requires the development of a design concept. A comprehensive design concept should spell out:

- Your objectives.
- The image you want to achieve.
- How buildings, and in particular store fronts, as well as backs, can be revamped to achieve this image.
- Where sensitive infill may be necessary.
- How signs can implement the image.
- What public improvements and beautification features are required to support the image.
- Desirable circulation patterns and parking availability that can make the scheme work.
- How it can be maintained at a reasonable cost.

Detailed guidelines for most of these elements of a physical design concept are defined in two Ministry of Municipal Affairs publications: "Commercial Area Improvements" and "Commercial Facade Improvements". A general discussion of the approaches available and their implications for existing buildings, infill development, downtown signage and public improvements follows.

Facade Improvements

The buildings, monuments and landmarks that make up a BIA are its most important physical asset. Buildings in particular are the testimony of a community's past. Preservation of such buildings - in a manner sensitive not only to its original architecture, but its functional use and owner's financial capability - can be a major contribution towards vastly improving the overall appearance of downtown and creating a desired image. Buildings do not have to be landmarks or historic gems to warrant attention. Even those which appear commonplace can be made more appealing with minor, but well thought out, rehabilitation. In addition it makes good economic and functional sense to restore, revitalize, rehabilitate or renovate what already exists.

Historic buildings are commonly comprised of three distinct parts:

- **the storefront**, which is at pedestrian level, is used to display goods, and provides the entrance to the building itself;
- **the upper facade**, which is the mass of one or more additional storeys used for a variety of purposes; and
- **the cornice**, which marks the termination of the building with the sky and was traditionally treated with great flourish and extravagance.

Any insensitive change to a building can destroy not only the balance between the three parts of the building facade, but also the complementary balance between buildings that took years to achieve. Historic preservation "does not mean returning downtown to a particular style or year, nor does it entail restoring buildings to museum standards, but rather combining the best of historic architecture with the best of contemporary design. This could involve such undertakings as:

- minimal rehabilitation;
- removal of inappropriate elements, such as oversized signs, and better maintenance;
- reconstruction of storefronts that have been badly remodelled; and
- improving a building that lacks architectural character through a contemporary design solution.

Whatever work is undertaken, however, should be compatible with, relate to, and visually reinforce the remaining buildings in downtown.

According to one noted authority, "revitalization through preservation is the least expensive and most effective long term solution to the resurrection of faltering downtown cores in communities across Canada. There are a lot of cheap fixes that are splashy, but they don't work over the long haul."*

Typically the older buildings which are most often found downtown were designed to complement and visually reinforce each other, and any revitalization program should attempt to maintain these relationships. Any program for physically improving the existing buildings which form the downtown -- through major or minor restoration, rehabilitation, renovation or revitalization - should incorporate a simple four-point design philosophy:

- Consider affordability - the gearing of improvements to available budget.
- Respect the original fabric.
- Provide sympathetic design solutions.
- Ensure low maintenance.

Often renovations are made necessary simply because of previous poor maintenance of those buildings. Frequently much of the work is not additive, but rather requires the removal of accumulated surfaces, paint, stucco, inappropriate signs, or just plain grime. Remember that no new surface is as durable and honest as the original material. One prime goal of the design scheme should be to minimize maintenance requirements by relying on the quality of the original materials and by making the building perform and weather better. Maintenance and durability are key considerations in any physical improvement program for downtown. Practical approaches to improving existing building facades are provided in "Commercial Facade Improvements", published by the Ministry of Municipal Affairs. See the bibliography for more details.

When contemplating restoration, it is important to remember that the history of the building itself offers opportunities for revitalization. Revitalization is frequently a question of knowing what is there and how to find it. Knowing what is there and how to find it requires five steps:

- Research the visual history of an old building through the use of old photographs, sketches or paintings.
- Based upon the historical research, develop a complete understanding of the building's past metamorphosis.
- Examine the physical details of the building.

* Forster, Steve: "The Perth Perspective" Canadian Heritage Magazine, May-June, 1983, page 11.

Honneger, Hans and Inwood, Robert: "Storefronts For Downtown", Reviving Main Street, 1985.

- Undertake an assessment of the condition or absence of typical facade elements.
- Carry out an investigative demolition process whereby the crust of more recent renovations are stripped and the historic fabric underneath is examined.

Three final important factors should be considered when dealing with BIA building improvements. First, for a downtown embarking on a program, several years may be required for execution of that program. Minor changes to store-front appearance can be a good short-term goal until longer term initiatives begin to bear fruit. In time, as more buildings have paid attention to facades and storefronts, the cumulative effect can be startling. Second, it is not necessary to restore a building to the exact condition it enjoyed the day it was built. And third, it is important to stress that buildings often do not need large amounts of money poured into them to make them look good.

Infill Development

Just as vacant buildings may give the BIA a rundown, tired appearance, vacant lots or gaps, resulting from fire or demolition, detract from its image of busy vibrancy. Such lots provide opportunities for infill development. Although new development should respect and "fit in" with its neighbours, attempts to duplicate old style buildings in the realities of today's contemporary marketplace are impractical.

Six infill design approaches have been applied in most downtowns, some of which are more sympathetic than others. It must be recognized, however, that each design problem is truly unique and a solution which fits one location may be entirely wrong for another. Each BIA must develop its own appropriate solution, in concert with the local municipality. The seven approaches are briefly summarized as follows:

1. **Indifferent Intervention** - This approach does not respond in any way to the surrounding environment and is often the manner in which infill actually occurs.
2. **Integration** - This approach attempts to harmonize the new building with those adjacent to it through the use of similar form, size, detail, material, and colour.
3. **Contrast** - This approach is the antithesis of integration in that a building is deliberately contrasted with its neighbours for visual effect. This is particularly effective for important buildings such as banks, churches, or post offices. Through proper design, the contrast can be achieved in a sympathetic manner.
4. **Invisible Approach** - This is a recent innovation and is best characterized by mirror-glass buildings which tend to reflect their surroundings and make little impact on the street.
5. **Analogous Approach** - This approach recreates certain aspects of the environment in new buildings while also introducing a modern touch.
6. **Combined Approach** - This combines several of the previous approaches to satisfy a number of conflicting design requirements. It may be possible to break down a project into its diverse components and apply the appropriate design solution to each component in turn while not sacrificing the overall unity of the project.

Sources: Peter Hyndman and Gordon Fulton

Signs

Purpose:

The preliminary purpose of a sign is not just to identify and locate a business, but to catch the customer's eye. By reflecting an image of the business, providing product information, and attracting attention, signs can create an image for the BIA, and the importance of good signage should not be overlooked.

Problems:

Seven problems with the signs in today's business areas have been identified.

1. **Scale** - Many signs are out of scale with the buildings to which they are attached and, at times, the area itself. Bigger is not always better.
2. **Number** - The apparent security in number of signs is often a false security. Redundant signage is expensive and can dwarf the impact of a building.
3. **Layering** - Competition to "out shout" neighbouring stores can lead to visual clutter. Signs become a distraction rather than an attraction.
4. **Orientation** - The automobile-oriented sign, designed to be read at greater distances and higher speeds than are normally found in a business area, have been inappropriately transferred downtown where slow moving cars and pedestrians are dominant.
5. **Target** - Downtown signs are often poorly targeted or not targeted at all. They are without focus and have no central point of interest.
6. **Mass production** - Mass produced signs are often inappropriate. They advertise a brand name such as Coca-Cola rather than the business they adorn.
7. **Deterioration** - Deteriorated signs reflect the owner's attitude towards his business.

Types of Signs:

There are four types of signs based upon the method of affixing a sign to a building.

1. **Signboards** Signboards are flat, rectangular signs placed in a specifically designed spot, usually between the storefront and second storey. These generally carry the business name only, thereby serving as the main source of identification, and are aimed at a "cross-street vantage."
2. **Window signs** Window signs are painted directly onto the inside of the main display window and are usually restricted to the business name. Such signs are aimed at the pedestrian in the immediate vicinity or across the street.

3. **Hanging signs** Hanging signs are projected or hung perpendicular to the face of the building and, as well as identifying the business, often incorporate a logo or product information in a symbolic form. These signs are designed for pedestrian traffic on the sidewalk adjacent the building.
4. **Awnings** Awnings, usually of canvas, provide an opportunity for painted signs. Traditionally, only the business name is displayed and can be directed to any audience depending upon which part of the awning is used (facing rake, valance or side panels).

Components of Effective Signage:

Effective signage, requires the consideration and interaction of four factors:

- Clarity of message.
- Logical placement.
- Accurate reflection of business image.
- Durability, quality and good maintenance.

These factors must be considered in redesigning ineffective signage as well as producing new signs. Redesigning ineffective signs in the BIA is an important component of physical revitalization. In most cases, redesign is required in order to:

- Clarify the business identity.
- Focus attention on certain aspects of the business.
- Improve the building's appearance.
- Suggest a progressive attitude to the client - to create an image of change.

Elements:

It is important that the major elements of a sign be understood before undertaking any redesign work. These elements include:

- Materials.
- Lettering.
- Placement.
- Style.
- Colour.
- Illumination.

Certain practical considerations are equally important including cost, regulations and local capabilities. Unlimited funds will not guarantee a good sign. For example, good quality plywood may be preferable to poor quality oak, will likely cost less, and will last longer.

Regulations and by-laws must be reviewed. Regulations in many communities may be overly restrictive and stifle the variety which gives life and vitality to the BIA. Conversely, they may be so lax as to diversely affect neighbouring businesses. A process for eliminating the extremes may be required.

Not all methods and materials for sign production may be available locally. Nevertheless, sign production should, wherever possible, be within the capabilities of local craftsmen. This material was developed by Heritage Canada's Main Street Programme.

Public Improvements and Beautification

A popular approach to physical revitalization of the BIA in recent years has been enhancement, usually of main street, by embarking on a major capital program of public improvements. Such improvements are intended to draw people to a beautified core area. They may include redesign of traffic and pedestrian flows or the addition of hardware such as benches, street lamps, drinking fountains and amenity islands. The approach is appealing and is often regarded as the universal panacea to downtown's ailments. The appeal of the approach rests upon a number of factors.

First, the designer's drawings look good. The "quick fix" approach is reinforced by these drawings. Second, public funding through grant programs or privately sponsored foundations is often available. Third, public improvements provide visual evidence that something is being done, and in the short term, result in a sense of relief and satisfaction.

There are, however, major pitfalls as well as advantages to public improvements. Unless careful implementation, close attention to local climate, topography and streetscapes, and consultation with residents and merchants are all considered, public improvements can have undesirable consequences. For example:

1. A massive improvement program undertaken in one community took several months to complete and deterred local residents from shopping in the area. A year later there are some 20 fewer merchants than before and many attribute this to the disruptive phase.
2. Colourful sidewalks and amenity islands proved popular in summer in another Canadian town, but in winter, these sidewalks become slick and dangerous to walk on and fenders are regularly dented on the concrete abutments of the islands.
3. In another small town, a T-intersection was upgraded to include attractive street islands and is now a challenge to truck manoeuvrability.

For BIA public improvement and beautification to work, they must augment and enhance:

- attractive buildings;
- quality merchandise and service;
- convenient access by car and foot; and
- thoughtful promotion techniques.

Public improvements alone will not bring the customer back to the BIA.

One approach that works, based upon practical experience, involves five considerations:

1. It must always be remembered that stores, professional offices and civic services are the BIA's chief attractions. These attractions must be made more attractive and accessible. First concentrate on what is there; then look at new attractions/developments.
2. Crash, large scale public improvement programs can result in massive disruption capable of causing the extinction of marginal businesses. Improvements should be phased and coupled with promotional events in order to limit disruption and maintain public interest. In fact, an imaging program should always accompany improvement programs which are disruptive, to minimize customer frustration and offset any negative reactions from the public.
3. Unless new amenities are of simple design, durable materials and seasonal adaptability, they become difficult and costly to maintain, invite mishaps and become the objects of vandalism.
4. If properly managed and planned, the automobile need not be banished from the BIA. People are prepared to park and walk if they know they are walking to an attractive, integrated shopping area. Utilize what parking space is available to the fullest.
5. Public improvements should be paralleled by the upgrading of business facades and an economic improvement program.

This approach provides a general overview of what to consider when embarking on a public improvement program. A brief summary of salient points to remember in planning and implementing such a program is provided below.

1. Avoid using public improvements to create a totally new physical image for downtown.
2. Avoid artificial themes.
3. Establish objectives, a budget and a plan for action.
4. Include priorities and a set schedule for implementation.
5. Put functional elements in good shape before investing in beautification projects. **Functional elements** include such features as sidewalks, parking lots, roadways and lighting infrastructure. **Beautification elements** may include trees, benches, planters, garbage receptacles and lighting fixtures.
6. Consider an incremental approach instead of large scale improvements.

7. Integrate improvements with other promotional activities.
8. Design public improvements to serve as a backdrop to BIA businesses.
9. Consider physical limitations such as climate.
10. When considering parking remember that:
 - pedestrian access to parking lots is important and requires the cooperation of public and private interests;
 - separating parking for merchants and employees frees on-street parking for patrons;
 - short term parking allows constant turnover of patron traffic; and
 - accessibility for the handicapped should be considered.
11. **Remember maintenance.** All amenities and improvements will require maintenance and this should be considered an important aspect of initial planning and budgeting. The durability of materials and replacement costs should also be considered along with potential for vandalism and theft. Scheduling of a maintenance program includes seasonal planting, routine repairs and emergency repairs. Few things can detract from the vital image of the BIA as effectively as planters devoid of plants during the summer season, especially if they become filled with garbage.

Based on material developed by Heritage Canada's Main Street Programme.

Evaluation

Any revitalization program should be evaluated to determine if it is working, and if the BIA is actually being revitalized. Evaluation in this context implies a measure of success and should be undertaken once most of the longer term actions comprising your comprehensive approach are either complete or well underway.

In evaluating your program, it is essential to look beyond the obvious, tangible evidence of success, such as the visual physical elements of revitalization. The evaluation of the less tangible, economic elements is far more crucial for determining if your revitalization program is working. You must ascertain if business has improved, if the BIA is really prospering, and if an improved physical image has resulted in a positive attitudinal change both within the BIA and the community. Evaluation of these less tangible elements requires considerably more effort than do the "hard core" easily identifiable, visual elements.

To assist you in evaluating your BIA program, eleven questions have been identified to help measure success.

1. How many vacancies now exist in the BIA compared to when the program started?
2. How many new businesses have located in the BIA since the program started?
3. How many business failures have occurred since the program started compared to before?
4. How many "facelift" projects have taken place since the project started?
5. How many businesses have reported increased sales since the program started?
6. Can an increase in Realty assessment be identified as a result of improvements since the program started?
7. Have there been reports of increases in property values since the program started?
8. How many new permanent jobs have been created in the BIA since the program started?
9. How many successful events can you count on continuing?
10. How has the competition fared since the program started?

11. What is the media saying? Is it standing up and taking notice? Are reports positive or negative?
12. Has the level of participation among BIA members increased?

Most of the information needed to answer these questions is easily obtainable through field surveys, discussions with BIA merchants and business groups, a few telephone calls to local realtors, discussions with key town staff, review of recent issues of the newspaper and perusal of town assessment, building permit and other files.

All of these elements may not be applicable in your particular situation. You may be able to identify certain more appropriate criteria that have not been included. Nevertheless, these questions provide a useful yardstick for measuring the success of your revitalization program. Remember to consider your evaluation in the context of economic developments both in your region and the Province.

In Sarnia, the BIA provides assistance to prospective businesses in cutting through red tape at City Hall to get building permits or zoning changes, if needed. They have experienced very positive results, according to Brad Brownlee, Executive Director.

The Sarnia BIA recruitment strategy included carrying out a marketing study, "prospecting" (approaching clients on a one-to-one basis) and arranging face-to-face meetings with prospective clients to sell the market potential of downtown Sarnia.

In just over a year the vacancy rate in downtown Sarnia dropped from 28 to 4 stores.

Conclusion

The most effective means of combining, budgeting for, implementing and understanding all the ramifications of the various aspects of physically revitalizing your BIA is through the development of a physical design concept. A well prepared concept will not only define a desired image, the interrelationships of all the different elements that must be considered, and ensure all elements and work undertaking support your objective, but also provides credibility for discussing your program and for obtaining funding.

A physical design concept for your BIA need not be elaborate and include detailed architectural drawings for every building. Like a physical improvement program, such detailed work should be done on an incremental basis. The concept should, however, be sufficiently detailed to make a statement - to depict the image you envision for your BIA. The Community Planning Advisory branch of the Ministry of Municipal Affairs offers grants to subsidize the costs of facade studies. For more information refer to the Resources section of this binder.

Throughout the process, it should be emphasized that physical revitalization may accomplish the horizontal sell -- attracting shoppers to the area -- but each merchant is expected to provide the vertical sell -- attracting people into the stores. Landlords must also play their part upgrading buildings as merchants improve the promotion and marketing of the core.

D. RESOURCES

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Introduction

Current data on different resources, especially funding programs, is difficult to provide since resources continually change. Therefore please note that this resource section is not definitive. It may contain some out-of-date information, however we will endeavour to update the manual frequently and send you current information. In all cases, check with the agency listed for current details on programs.

Community Renewal Branch Services for BIAS

THE COMMUNITY RENEWAL BRANCH - HELPING BIAs TO HELP THEMSELVES.

Throughout this manual you will find the phrase "for more information, consult the Community Renewal Branch". The branch is responsible for Section 217 of the Municipal Act which sets out the mandate for BIAs.

In addition to providing the enabling legislation, the Community Renewal Branch provides a wide variety of advisory, educational, information and financial support to meet the ever-increasing needs of BIAs across the province.

The branch's advisory services include:

- help in simplifying and interpreting the BIA legislation.
- assistance on problems associated with the establishment, ongoing management and administration of your BIA.
- help to sort out the information and appropriateness of programs offered by other Ministries and the Federal government which may be accessed by the BIA.
- advice on how to select and supervise a consultant for management, marketing, facade or streetscape studies which you may wish to undertake.

The branch also has a variety of educational and informational programs to assist you. They include:

- the publication An Introduction to BIAs which explains what a BIA is and what it does. It is an excellent booklet to send to your current membership, new BIA members and members of municipal council and staff.
- workshops and seminars for individual BIAs and groups of BIAs, to provide ideas and concepts to help you improve the performance of your BIA.
- the publication Street Beat, an information exchange vehicle for BIAs.
- the publication of BIA "Profiles" which document the successful experiences of BIAs across Ontario.
 - production of technical guidelines and leaflets on how to operate your BIA more effectively.
 - promotions and acknowledgement of excellence in BIA operations through administration of the PRIDE awards program.
 - co-sponsorship, with the Ontario Business Improvement Area Association, of the annual Ontario BIA conference.

- co-sponsorship, with OBIAA and Heritage Canada, of the 1988 National Conference on Downtowns.
- sponsorship of the annual BIA Managers seminar.
- sponsorship of the annual BIA Chairmans seminar.

The branch also administers a financial assistance program to assist Ontario municipalities and their BIAs to upgrade older commercial areas by providing funds for a variety of physical improvements. The program is known as PRIDE, program for Renewal, Improvement, Development and Economic revitalization. Branch staff are available to assist you in explaining the details of PRIDE, eligibility requirements and application procedures.

These are some of the services of the Community Renewal Branch available to you. Currently the branch has eight community planners who are directly involved in delivery of these services. Each planner has responsibility for a specific geographic area of the province and are directly responsible for BIAs in their area. If you have any questions about the services available to you from the branch, your planner will be able to explain our services to you.

You may have already met the planner for your area through BIA or PRIDE related activities. If not, we would be pleased to hear from you.

In addition, the branch has a BIA expert on staff to provide educational seminars and advice to BIAs, at the request of area planners.

A number of BIA related publications have been produced by the Ministry of Municipal Affairs. To order any of the publications below please contact:

The Ontario Government Bookstore
880 Bay Street
Toronto, Ontario M7A 1N8
1-800-268-7540 (Toll free)
Area code 807: Ask for Zenith 67200

AN INTRODUCTION TO BIAs (Free)
COMMERCIAL AREA IMPROVEMENTS (\$7.50)
COMMERCIAL FACADE IMPROVEMENTS (\$7.50)
FACADE BOOKLET (Free)
DOWNTOWN MANAGEMENT - THE STATE OF THE ART IN ONTARIO (\$5.00)
TOWARDS EXCELLENCE IN DOWNTOWN MANAGEMENT (\$5.00)
COMMERCIAL PARKING - A PLANNERS HANDBOOK (\$5.00)
THE EMPLOYMENT OF PROFESSIONALS IN BIAs (\$1.25)
PROVINCIAL ASSISTANCE TO MUNICIPALITIES, BOARDS AND COMMISSIONS

Whether you require advice on dealing with running effective general meetings, or recommendations on how to manage your BIA, the staff of the Community Renewal Branch are available to provide your BIA with the practical and expedient information. For more information call the branch at (416) 585-6013, or write:

The Community Renewal Branch,
Ministry of Municipal Affairs,
777 Bay St. 13th Fl.,
Toronto, ONT. M5G 2E5

Resources Available to BIAs

The following list of resources provides information on some, not all, of the programs you can use to assist your revitalization efforts.

Because many resource programs change on a yearly basis we have included only those which BIAs have found useful to access and which have proven beneficial over a sustained period.

Programme:	Loan and Education Programs
Agency:	The Federal Business Development Bank
Purpose:	The F.B.D.B. offers flexible financial services, and investment banking services including: (CASE) counselling, training and information.
Contact:	Any branch across Ontario.
Programme:	Main Street Canada
Agency:	The Heritage Canada Foundation
Purpose:	To help communities revitalize their Main Street, taking advantage of their architectural resource.
Contact:	Stephen Lauer, Ontario Regional Co-ordinator (519) 622-3036, Heritage Canada's phone number is (613) 237-1066
Programme:	Heritage Conservation
Agency:	Ministry of Citizenship and Culture
Purpose:	To provide assistance towards the conservation, protection and preservation of areas, properties, buildings and archaeological materials and sites of heritage value in Ontario.
Contact:	Ontario Heritage Foundation (416) 965-9504. Regional offices of the Ministry are listed in the blue pages of your phone book.
Programme:	Northern Community Economic Development Assistance Program
Agency:	Ministry of Northern Development and Mines
Purpose:	To assist communities in Northern Ontario to become actively involved in economic development at the local level.
Contact:	Local offices of the Ministry of Northern Development and Mines Northwest (807) 475-1585 Northeast (705) 675-4441

Programme:	Small Business Service
Agency:	Ministry of Industry, Trade and Technology
Purpose:	To provide advice, counsel and advocacy to small businesses in the Province.
Contact:	Ministry of Industry, Trade and Technology (416) 965-6304
Programme:	Convert to Rent
Agency:	Ministry of Housing
Purpose:	To increase the supply of affordable rental housing, generate employment in Ontario's construction and related industries, and make the most of Ontario's valuable building stock resources.
Conagact:	Ontario Housing Corporation, as listed in the blue pages of the telephone book.
Programme:	Experience
Agency:	Ministry of Municipal Affairs
Purpose:	To provide students with practical work experience during the summer months.
Contact:	Ministry of Municipal Affairs (416) 585-6013
Programme:	PRIDE
Agency:	Ministry of Municipal Affairs
Purpose:	PRIDE is a Program for Renewal, Improvement, Development and Economic revitalization through comprehensive community improvement.
Contact:	The Community Renewal branch of the Ministry of Municipal Affairs, (416) 585-6013
Programme:	Funding programs for hiring and training people
Agency:	Employment and Immigration
Contact:	Local Employment and Immigration office; see the blue pages in your local phone book.

OTHER RESOURCES:

THE COMMUNITY RENEWAL BRANCH

- Community Planner assistance with advice and information
- Street Beat; the Ministry's newsletter to BIAs.
- BIA Resource Centre; full of ideas for BIAs.
- Slide shows such as:
 - Facade Improvement
 - Commercial Area Improvement
 - PRIDE
- BIA Profiles of: Cambridge, Belleville, Dryden, Bloor West
- Village, Cliffside Village, Tillsonburg and others.
- The annual BIA Survey
- Co-sponsor annual BIA conference

THE COMMUNITY PLANNING ADVISORY BRANCH

- Community Planning Study Grants
- Funding 50/50 between Ministry and municipality to undertake certain studies. Marketing or Facade studies will be considered

THE ONTARIO BUSINESS IMPROVEMENT AREA ASSOCIATION

- Provide advice, information and assistance to member BIAs
- Co-sponsor annual BIA conference
- Various benefits to members including contact with Provincial government. (416) 634-5888. Fee.

OTHER GROUPS AND ORGANIZATIONS

- Conservation Authorities
- Consultants and Designers
- Educational Institutions
- Engineering or Public Works/Planning departments
- Horticultural societies
- Ontario Chamber of Commerce (416) 482-5222
- Local Chambers of Commerce
- The Ontario Parks Association
- Parks and Recreation departments
- Service clubs
- International Downtown Association (202) 783-4963
- Downtown Idea Exchange (212) 206-7979 (newsletter)
- Downtown Promotion Reporter (212) 206-7979 (newsletter)
- Retail Council of Canada (416) 598-4684
- Canadian Federation of Independent Businesses (416) 222-8022
- Canadian Organization for Small Businesses (416) 492-3223
- Ministry of Industry, Trade and Technology regional offices.
- Local Architects Conservation Authority Committee (LACAC)

List of Resource Materials

GENERAL:

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